



## Bloxham School

**PRIVATE AND CONFIDENTIAL**

### Means-tested Bursary Application

#### NEW PUPIL

**To be completed by Office Staff only**

**Pupil Name:** .....

**Pupil ID no:**.....

**Term/Year of Entry:** .....

**Date Posted:** ..... **Initialled:** ..... **Date Rec'd:** ..... **Initialled:** .....

**Place Registered:**

**Date F&GP:** ..... **Initialled:** .....

**Place Confirmed:**

**Award:**.....

# Introduction

Bloxham School offers funds to provide means-tested support to pupils at Bloxham School in respect of school fees for pupils at the start of an academic year.

If you wish to be considered for financial assistance with school fees and have registered with the School, please complete the form below and return it to Lorraine Roper in the admissions office at the school. This is then forwarded to the Bursar and Finance Manager for an assessment to be made before being presented to the Awards Committee for consideration and then ratified by the Finance and General Purpose Committee (F&GP).

Neither the offering of a place at a school, nor meeting the eligibility criteria for financial assistance, means that an award will necessarily be made. The F&GP Committee, which includes Trustee representation, have only a limited amount of money available from which to make awards. These are subject to the Trustees absolute discretion and many factors are taken into account before deciding on the successful applications and also the level of any award.

The decisions on awards are made during or before the Lent Term and communicated to applicants in conjunction with the letters detailing the offer of a place. In the event that an award is offered, it will be stated as a provisional sum based on the information contained in this form and subject to final verification of the assessment details.

All awards are means-tested, subject to verification (which may include a home visit or external agency investigation) and the right to annually reassess by recompletion of this form.

## Completing the application form

The following information is required under three broad headings:

- I. Family details: to assist in determining the family unit responsible for the applicant's welfare and education. **We will require proof of your address and therefore request a copy of a utilities bill, council tax bill, passport or driving license with your address clearly evident.**
- II. Income: income figures will be requested for the person(s) deemed responsible for the applicant's welfare and education. **Supporting information required to accompany this application form include, where relevant, a copy of your most recent P60, a previous months' pay slip, a self-assessment tax return and supporting material.** The Trustees reserve the right to require, for assessment purposes, details of all financial resources available to the child's custodian including the income of any new spouse, or other person helping to support the family.
- III. Capital assets: estimates of the value of capital assets will be requested for the person (s) deemed responsible for the applicant's welfare and education. **Please accompany your application with the relevant paperwork as evidence of the declared asset value. This will include your property valuation, investment portfolio valuation and recent mortgage statement with contents insurance certificate where appropriate.**

Some of the questions may not apply to your particular family circumstances, if so, please mark accordingly. If you need more space to provide further details, please either copy the relevant pages or attach a supplementary sheet. Following receipt of your application form we may need to ask you some further questions to help Trustees make their decisions or arrange a home visit to discuss the content of your application.

Please now read the Principles of a Bursary Award below before completing your application form.

# Principles of a Bursary Award

1. The granting of any financial assistance is at the discretion of The School's Board of Governors. This may be delegated to the F&GP Committee, which must be constituted and conducted in accordance with the terms of reference agreed by the Trustees. The Trustees are not bound to explain the exercising of their discretionary powers.
2. The provision of any false information will allow the school to rescind an award with immediate effect. In addition, any amounts previously awarded may be revised and additional parental contributions sought if applicable.
3. The level of any Means-Tested Bursary Award granted will take into consideration any other Scholarship or Discounts already awarded by the school to the child(ren). If a Scholarship or Fee Discount is granted after a Bursary Award has been approved, the level of the Bursary Award may be reduced and/or a new application for an Award required.
4. All Bursary Awards are conditional upon the prompt payment of fees, good behaviour and academic diligence. Failure to pay school fees on time may result in an award being removed and subsequent action being taken by the school in line with the Bloxham Parent Contract.
5. Any amount awarded will be credited to the child's fee account on a termly basis and accrued at that rate.
6. Parents undertake to report immediately any material change in the financial position declared. Failure to do so may result in your award being removed and also the shortfall in fees paid backdated to the period when a change took place.
7. Where a parental assessment is adjudged to be over scale for a second continuous year, the award will be cancelled. This will not prevent a subsequent application in the event that the parent's personal situation changes.
8. Where parents fail to produce and return the annual declaration of financial circumstances along with evidentiary documentation by the return date indicated, any financial assistance may be immediately rescinded and required to be repaid.
9. Bursary Award applications will only be processed and considered for children already at Bloxham School or who have registered to attend. If your child(ren) has not been registered, then this Application Form must be returned with a completed Registration Form in order for it to be considered.
10. The Trustees will agree a set of scales which shall be the maximum permitted award from the sums determined by the Trustees that are to be made available for bursaries. No form of means tested assistance should exceed these levels where funding is from The School's resources.
11. The continuation of a bursary award is subject to sustained effort and achievement requisite with the level required by the school for new pupils and is at the discretion of the Head.

# DECLARATION

The following declaration should be signed by both parents (see below):

I/We confirm that we have read the Principles of a Bursary Award and understand and accept them. I/We declare that to the best of my/our knowledge and belief, all the particulars submitted on the following pages are true and contain a full statement of my/our income and assets from all sources during the periods shown. I/We have provided, where appropriate, all documentary evidence as required to support the information declared. I/We understand that the provision of false information may lead to my/our child being disqualified from assistance under the scheme.

Signature:

Parent/Guardian 1: \_\_\_\_\_ Date \_\_\_\_\_

Parent/Guardian 2: \_\_\_\_\_ Date \_\_\_\_\_

If the above declaration is signed by only one parent/guardian, please delete as necessary below.

Divorced / Legally Separated / Widowed / Other - state reason:

If divorced, separated or widowed please provide documentary evidence.

Please send the completed form (marked Private and Confidential) to:

**Lorraine Roper, Admissions Office, Bloxham School, Bloxham, Oxfordshire, OX15 4PE**

## A. Family details

Please enter the name of the Child(ren) to be considered for award:

Surname	First names	Gender M/F	Date of birth (dd/mm/yyyy)	Academic Term and Year of Entry (eg Autumn 2023/24)	School Form Year of Entry (Eg 1 <sup>st</sup> , 3 <sup>rd</sup> , L6)	Boarding Status (Eg. Full Boarder, Day Boarder or Day House)
A1.1						
A1.2						
A1.3						

Normal residential address of child:

Current address	Previous (if at current address for less than 3 years)
A2	

### Child Information

	Child 1 (ref A1.1)	Child 2 (ref A1.2)	Child 3 (ref A1.3)
A1.1 Current school			
Has a bursary application been submitted before?			

**Parent/Guardians:**

	Parent (Father)/Guardian 1	Parent (Mother)/Guardian 2
A3 Name		
A4 Marital Status		
A5 Relationship to child		
A6.1 Current normal residential address (if different to child)		
A6.2 Previous residential address: (if at current address for less than three years & and different from above)		
A7.1 Tel. Number (home)		
A7.2 Tel. Number (work)		
A7.3 Tel. Number (mobile)		
A7.4 Email Address		

**Siblings who will be attending Bloxham School in year of award**

	Sibling 1	Sibling 2	Sibling 3	Sibling 4
A8 Name:				
A9 Date of birth:				
A10 School attended:				
A11 Awards held:				
A12 Fees paid in 2021/22:				

## B. Income

	Parent (Father)/Guardian 1	Parent (Mother)/Guardian 2
B1 Employment Status: <i>Unemployed, Employed, Self-Employed or Retired</i>		
B2 Profession, business or trade:		
B3.1 Name and address of employer:		
B3.2 Job title:		
B3.3 Do you have any ownership of the business? If yes, what percentage or share do you hold?		

	Parent (Father)/Guardian 1		Parent (Mother)/Guardian 2	
	Tax Year 2022/23 Actual	Tax Year 2023/24 Estimated	Tax Year 2022/23 Actual	Tax Year 2023/24 Estimated
B4.1 Gross Income from employment / self-employment including bonuses.				
B4.2 Taxable value of any benefits in kind received e.g. <i>heat, light, car, phone, reduced accommodation</i>				
B5 Gross pensions received Include state, employers or other				
B6 Social Security benefits received (please give details)				
B7 Income from property assets				

**B. Income (cont.)**

	Parent (Father)/Guardian 1		Parent (Mother)/Guardian 2	
	Tax Year 2022/23 Actual	Tax Year 2023/24 Estimated	Tax Year 2022/23 Actual	Tax Year 2023/24 Estimated
B8 Gross interest received from bank/building society				
B9 Gross dividend income received				
B10 Other investment income received (gross)				
B11 Gross value of any redundancy or termination payments received.				
B12 Separation or maintenance allowance payments received. – <i>include single parent benefit</i>				
B13 Amounts received under any court orders (other than included in B12 above)				
B14 Other income received not included in any other heading. Please give details – e.g. <i>family members, another charity</i>				

B15

Other relevant information to be taken into consideration:

**C. Capital Assets**

	Parent (Father)/Guardian 1	Parent (Mother)/Guardian 2
C1.1 Is your current main residential address owned, rented, housing association, other?		
C1.2 If owned, what is your estimate of the market value at 31 March 2023?		
C1.3 If owned, what is the council tax band?		
C1.4 If owned, what is the approximate value of any outstanding mortgage at 31 March 2023– amount and term? Is it repayment or interest only?		
C1.5 What is the annual mortgage/rental payment?		
C2.1 Please give an approximation of the market value of any other property owned in the UK or abroad at 31 March 2023.		
C2.2 Please give an approximate figure for any outstanding loan finance on such properties at 31 March 2023.		
C2.3 If applicable, please give details of the council tax band(s) of these other properties.		
C2.4 Address of second property (if applicable)		
C2.5 Use of second property		
C3 Please give an estimated total value of any investments i.e. stocks, shares, endowment policies at 31 March 2023.		
C4 Please give an estimate of your average cash balance during the year, including current & deposit accounts – banks and building societies.		

**C. Capital Assets (cont.)**

	Parent (Father)/Guardian 1	Parent (Mother)/Guardian 2
C5 Please give an estimate of the insurance value of other possessions including contents of home, car etc. at 31 March 2023.		
C6 Please detail the annual value of any awards by third parties towards fee assistance.		
C7 Please give details of any other assets not covered under the above headings		

C8

Are any members of the family potential beneficiaries of any existing trust funds? If yes, please provide details.

C9

Other relevant information to be taken into consideration:

The information provided on this form will be used to assess your application for a bursary or continuation of an existing award from Bloxham School. Should your application be successful it will become part of the record that we maintain. Should your application not be successful we will retain this form for 12 months after which it will be destroyed. We may wish to contact relevant third parties to verify the information you have provided or to obtain additional pertinent information about you. By submitting this application, you give your consent for us to make these enquiries and for the third party to disclose the information we request.

\*There are no continuation sheets attached / There are \_\_\_\_\_ pages of continuation sheets attached

\* Please delete as appropriate



Bloxham School, Bloxham, Oxfordshire, OX15 4PE, United Kingdom  
 Tel: 01295 720222 Fax: 01295 721897 [www.bloxhamschool.com](http://www.bloxhamschool.com)

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