



# **BURSARY APPLICATION FORM**

## **BURSARIES**

Financial support with fees (ranging from 10%-100%) is available to both Junior and Senior School pupils. Most bursaries will be awarded to pupils from families with a total income of less than £30,000 per year and no capital assets other than their home.

### **Who Can Apply?**

Awards are available to all new applicants for both the **Junior** and **Senior** Schools.

A limited number of awards are granted to existing pupils at the School and are determined by the availability of bursary funds at the time. They are intended to assist existing pupils where there has been a significant change in financial circumstances, such as loss of income, which threatens the pupil's continued attendance at Kelvinside.

The Bursary Committee is made up of 3 members of the Board of Governors who are advised by the Rector and Bursar on the educational and financial circumstances of the applications. Their process for reviewing bursary applications is designed to be consistent, fair and straightforward.

### **Eligibility**

In all cases, the level of bursary is determined by the extent of financial need. To allow this to be assessed, the Bursary Application Form – which provides information on the family and documents total income and capital assets – must be completed. Key to the review is the establishment of the net resources of parent(s)/guardians(s) which can be defined as total income from all sources (including investment income). Capital assets such as stocks, shares and property are also taken into consideration.

Once net resources have been confirmed the Awards Committee will decide the level of assistance to be granted. The test of net resources is carried out annually and bursary award adjustments are made in line with any significant changes in financial circumstances.

Parents may also wish to have a short meeting with the Bursar so that eligibility can be fully explained.

### **Application Process**

If your child is not current attending Kelvinside, an application for admission is required in the first instance. Application forms and Bursary Application forms should be completed and returned to the Registrar.

The academic criteria for bursary candidates are the same as other entrants to the School. Prospective pupils are expected to demonstrate their potential through the assessment process and show commitment to the ethos of Kelvinside Academy.

Parents may apply for enrolment of their child on the basis that acceptance will be conditional upon receiving bursary support. The main round of bursary considerations takes place in February. Awards are identified and notified in mid-February, together with the offer of a place. This allows parents time to consider the level of financial assistance offered when deciding whether or not to accept a place at the School in the new academic session which begins in August.

Parents of prospective pupils must advise the School if they wish to take up the offer of a place and bursary within two weeks of receiving an offer.

Applications from prospective parents may be submitted after this date but awards may be limited and will be dependent upon the residual availability of bursary funds.

## **Awards**

Following assessment of the information provided in the Bursary Application Form, the Bursary Committee will decide whether support is appropriate and upon the level of such support.

Unsuccessful cases are usually the result of a lack of evidence of financial need or insufficient availability of bursary funds. There is no course of appeal following the award decision but unsuccessful applicants may re-apply in subsequent years.

Where the number of applications received creates the possibility of bursary funds being oversubscribed, account will be taken of the degree to which individual pupils will benefit from the opportunities available at Kelvinside Academy.

The formal offer will be made by letter to the parents and must be accepted in writing.

Bursary awards are deducted from the tuition fees and this is shown on the free note which is sent out by the School. No actual payment is made to the parent.

All bursaries are reviewed annually by the Awards Committee and assume the continuing hard work and commitment by the recipient.

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**1.0 CHILD'S NAME**

- a) Full Name(s) \_\_\_\_\_
- b) Date of Birth \_\_\_\_\_
- c) Year Group/Session \_\_\_\_\_

**2.0 PARENTS (see Note 2)**

***Father/Guardian***

***Mother/Guardian***

- a) Name(s) \_\_\_\_\_
- b) Title \_\_\_\_\_
- c) Address(es) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- d) Occupation \_\_\_\_\_
- e) Retired  Employed  Self-Employed  Unemployed  (please tick ✓)
- f) Name & Address of Employer or Business: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- g) Are you a Director/Proprietor of this Company/Business? YES/NO  
If Yes – please state proportion of Company/Business you and/or your spouse/partner own: \_\_\_\_\_
- h) Contact Details:  
Daytime/Business Tel No: \_\_\_\_\_  
Evening Tel No: \_\_\_\_\_  
Mobile Tel No: \_\_\_\_\_  
Fax No: \_\_\_\_\_  
Email Address: \_\_\_\_\_

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**3.0 INCOME** (see Note 3)

(please enter below your earnings and income from all sources for the tax year to 5<sup>th</sup> April 20.....)

	<b>Father £</b>	<b>Mother £</b>
a) Gross Salary and other similar earnings (including all taxable benefits)	_____	_____
b) Profit(s)	_____	_____
c) Gross pension, widow's pension etc	_____	_____
d) Gross Investment Income from:		
i) Building Societies/Banks	_____	_____
ii) Dividends	_____	_____
e) Gross Income from Property	_____	_____
f) Social Security Benefits	_____	_____
g) Inland Revenue Benefits (including Child Benefit and Child Tax Credit Award)	_____	_____
h) Separation or Maintenance Allowance	_____	_____
i) Is there a Court Order/Separation Agreement?	_____	_____
j) Benefits in Kind provided free by reason of Employment	_____	_____
k) Any other income not included in a) to j) above	_____	_____

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**4.0 OUTGOINGS** (see Note 4)

	<i>Annual £</i>	<i>Annual £</i>
a) Tax payable on Income(s) declared above (including tax deducted at source)	_____	_____
b) National Insurance Contributions	_____	_____
c) Superannuation Contributions	_____	_____
d) Mortgage Payments (including interest)	_____	_____
e) Endowment Mortgage Insurance	_____	_____
f) Any other interest payable	_____	_____
g) Annual rent payable on principal residence (if applicable)	_____	_____

**5.0 CAPITAL ASSETS** (see Note 5)

a) Approximate market value of all investments		
i) Building Society/Bank deposits	_____	_____
ii) Equity Investments, Government Stocks	_____	_____
iii) PEPs, ISAs, TESSAs	_____	_____
b) Approximate market value of Principal Residence	_____	_____
c) Approximate market value of other Possessions (including house contents, car etc)	_____	_____
d) Cash at banks or elsewhere ( <i>current accounts only</i> )	_____	_____



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**7.0 DEPENDENT CHILDREN** (see Note 7)

***(Include the Child to whom this application refers below: if more than 3 children, give details on a separate sheet)***

a) Forename	_____	_____	_____
b) Date of Birth	_____	_____	_____
c) Sex	_____	_____	_____
d) Name of current School, College or University	_____	_____	_____
e) Annual School or other educational fees ( <i>excluding extras and sundry disbursements</i> )	_____	_____	_____
f) Compulsory additional School charges	_____	_____	_____
g) Amount of fees shown in e) covered by:			
i) Scholarships/Bursaries or allowances given by School	_____	_____	_____
ii) Annual sum arising from capital repayment scheme	_____	_____	_____
iii) Diplomatic/Company Education Allowances (gross) { <i>state whether sum has been     included in gross salary at 3a</i> }	_____	_____	_____
iv) Annual sum arising from Educational Insurance Policies	_____	_____	_____
v) Assistance from any other sources e.g. Grandparents/ Trusts/Settlements etc ( <i>please     specify</i> )	_____	_____	_____
h) i) Annual income of child ( <i>if any</i> )	_____	_____	_____
ii) Capital Value of Trust	_____	_____	_____

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*The details requested with regard to the fees payable and awards received on behalf of your other children are for information only and will not normally be taken into account in the assessment of the level of grant awarded.*

**8.0 OTHER DEPENDENTS** (see Note 8) *(Please give details)*

**9.0 VERIFICATION OF INCOME**

You will be expected to provide documentary evidence in support of the income figures in Section 3.0. Listed below are examples of the evidence required:

P60	Tax Return
March Pay Advice	Self-Assessment Tax Calculation
Report & Accounts (including Balance Sheet) for the years	
Others <i>(Please specify)</i> _____	

**VERIFICATION OF ASSETS**

You will be expected to provide documentary evidence of capital assets. Listed below are examples of the evidence required:

Property Valuation	Investment Portfolio Valuation
Mortgage Statement	Contents Insurance

**10.0 ADDITIONAL INFORMATION/LEVEL OF ASSISTANCE REQUIRED**

Do you have any other information that you feel is relevant to your application which you would like to divulge? If so, please mention below and include an indication of the level of bursary support that you require:

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**11.0 DECLARATION**

After having read the attached notes, the following declaration should be signed by both parents/applicants (or see below):

We/I have read the notes and have made a complete declaration of our/my income and assets.

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We/I understand that if we/I are/am offered a Bursary for our/my child and accept a place for him/her at the School:

- a) our/my child's fees account with the School will be credited termly with the amount of the Award;
- b) understand that any award is subject to annual review and that we/I must complete an annual declaration of our/my financial circumstances on the form sent to us/me by the School and supply all relevant supporting evidence by the return date indicated;
- c) undertake to report immediately any material change in the financial position declared;
- d) the Award may be withdrawn or reduced and, in certain circumstances, past payment reclaimed if:
  - i) there is a breach of the Enrolment Agreement and Parental Consent Form attached to the acceptance of a place for our/my child at the School;
  - ii) we/I have knowingly and/or recklessly provided false information;
  - iii) we/I have failed to return the annual declaration of our/my financial circumstances by the return date indicated;
  - iv) we/I have failed to produce any additional information required by the School to evidence our/my financial circumstances;
  - v) there is, in the view of the Rector, either unsatisfactory work or conduct;
  - vi) the School's resources are insufficient to maintain the level of award.

**SIGNATURES:**

**FATHER/GUARDIAN** \_\_\_\_\_

**DATE:** \_\_\_\_\_

**MOTHER/GUARDIAN** \_\_\_\_\_

**DATE:** \_\_\_\_\_

**If the above declaration is signed by only one parent, please delete as necessary below:**

Divorced/Separated/Widowed/Other (*state reason*)

**ASSISTANCE FROM OTHER SOURCES**

Please state whether you have applied to trusts or foundations for an award and, if so, to which and with what result.

**The completed form should be returned to the Registrar at the following address:**

**Kelvinside Academy  
33 Kirklee Road  
GLASGOW  
G12 0SW**

# **KELVINSIDE ACADEMY BURSARY APPLICATION FORM**

## **NOTES FOR GUIDANCE**

Before completing the form, please read these notes carefully, and contact the Bursar if further information or advice is required. These notes refer to the corresponding paragraph on the Form.

**The School reserves the right to seek any other documentary evidence in support of the income and asset figures submitted to make enquiries which it deems necessary.**

All financial values should be shown in Sterling. References to Her Majesty's Revenue and Customs should include the relevant National Taxation Authority.

### **2.0 PARENTS/APPLICANTS**

These are defined as:

- The natural father and mother of the child where they live together (whether or not they are married to each other) and the child normally resides with them both in the same household; or
- The parent of the child with whom the child normally resides and the partner (if any) of that parent where the partner normally resides with that parent and the child in the same household; or
- The child's guardian appointed in accordance with Section 5 of the Children Act 1989 (or any earlier enactment) and the partner (if any) of that guardian where the partner normally resides with that guardian and the child in the same household; or
- The person with whom the child resides in accordance with either:
  - i) a subsisting residence order made under Section 8 of the Children Act 1989; or
  - ii) a subsisting court order (other than a residence order) which specifies who is to have actual custody or care and control of the child; or
- Where a pupil either has no parents as defined above or the School is satisfied that no such parents can be found, and he is either looked after by a local authority or provided with accommodation within the meaning of Section 105(1) of the Children Act 1989, the pupil shall be treated as one whose parents have no income for the purposes of the scheme; or
- Where none of the above applies, the parent is the person with whom the pupil normally resides in accordance with any informal care or fostering arrangement and that person's partner (if any) where the partner normally resides with that person and the pupil in the same household.
- If parents are separated or divorced before or while their child attends the School, both mother and father will require to complete and sign the Application Form.

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**3.0 INCOME**

- a) The gross annual amount of salaries and wages, including any earnings from profit related pay, part-time employment and any sum received as bonus, commission etc, statutory sick pay, statutory maternity pay giving GROSS amounts (before deduction of tax, NI, superannuation etc) for the current or latest financial year. Taxable benefits in kind agreed with the HMRC should also be shown (free or subsidised housing, meals, petrol, cars, etc) at the amount agreed for taxable purposes.
- b) Profits from a business or profession – at the amount of GROSS income agreed by HMRC or relevant tax authority for the year in question (deductions should be made only in respect of capital allowances, losses and stock relief). Copies of the latest set of accounts should be included.
- c) All other investment income (e.g. interest or National Savings Bank deposits, dividends, annuities etc) should be entered GROSS of tax. If tax was deducted at source, parents should add in the amount of tax paid or tax credit notified. Building Society interest must be disclosed GROSS.
- d) All social security benefits received should be declared and type of benefit specified.
- e) Court Orders/Legal Separation Agreements and Voluntary Arrangements for School Fees – Where a parent is required by a Court Order, or a legal binding separation agreement (e.g. Deed of Separation) to pay part of the School fees, then only that part of the fee which is not covered by the Court Order/Agreement will be used to calculate any grant to be awarded. This is irrespective of whether or not the order or agreement is being complied with. Where the whole amount of the fees are required to be eligible for a grant. You should indicate how many years are payable and any annual variations. All receipts relating to maintenance payments, separation allowances and sums in respect of Child Support maintenance must be declared.
- f) Include free benefits in kind agreed by HMRC as not subject to tax e.g. representative occupation of house, free meals.
- g) Enter income from letting of sub-letting of property at the amount of the NET profit agreed with the HMRC; and royalties and other sources including entertainment and travel allowances etc.

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**4.0 OUTGOINGS**

- a) Enter Income Tax and Tax on unearned income SEPARATELY.
- b) Enter annual superannuation contribution (if applicable) payments to other Pension Schemes.
- c) Enter capital as well as interest payment on a mortgage for the principal residence.
- d) Only complete this is repayment is effected by means of a full Endowment Policy.
- e) Include bank overdraft and other loan charges incurred during the year (specifying the purpose of the loan).

**5.0 PARENTS'/APPLICANTS' CAPITAL ASSETS**

In addition to taking account of all relevant sources of income, the School takes account of the following assets:

- a) The capital sum of any monies on deposit with any bank, deposit taker or building society. Investments in stocks and shares, valued as near as possible to the date of submitting the application form.
- b) The current market value of your principal residence. The current market value should be estimated by parents.
- c) If you run your own business or are partners in a business, then you should show the net worth of the business. Shares in a company not listed on a stock exchange should be valued at the relevant proportion of the net value of the company.
- d) In the case of second homes and/or other properties, these should also be included at their estimated current market value; no allowance will be made for any outstanding mortgages.

**6.0 PARENTS'S/APPLICANTS' CAPITAL LIABILITIES**

Details of other liabilities should be provided along with the lender.

**7.0 DEPENDENT CHILDREN**

Use column 1 for the child for whom you are now applying at his/her current school rate. Enter in other columns any other of your children who are pre-school age or are un-married and at a school, university or other education institution which attracts a grant.

- a) The figures to be inserted here refer to the current academic year.
- b) i) Members of Diplomatic Service should include the amount of any Education Allowances which they receive. Parents in other occupations should include any similar sum.

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- ii) Insurance Policies for School Fees – If any insurance policy for the payment of School fees exists, then the amount declared is the amount receivable under the policy for the academic year for which the application is being made. If the insurance policy covers the full cost of the tuition fees, then the pupil is not eligible for a grant. The types of policy concerned are those which stipulate that the company shall pay the School fees, in whole or in part, to the School in respect of the pupil.
- iii) Where a Trust Deed has been drawn in favour of a child for whom you are applying, details of the annual amount available and the date of commencement of payment under the Deed should be given.
- c) Where the child has any unearned income e.g. interest from National Savings, bank or building society deposits, or receives share dividends, you should enter the source of the income and gross amount received before deduction of any tax. Do not include income from part-time employment or student grants. You should enter the capital value of any beneficiary or other trust set up for each child.
- d) In the case of second homes and/or other properties, these should also be included at their estimated current market value; no allowance will be made for any outstanding mortgage.

**8.0 OTHER DEPENDENTS**

If you qualify for a Carer's Allowance, or have an aged grand-parent or relative living with you or dependent on you, please provide details including age, address, condition etc.

**9.0 ANY OTHER RELEVANT INFORMATION**

Please enter, on a separate sheet if necessary, any details which may affect the assessment of a grant e.g. a significant change in income or outgoings for the coming year.