

OLD BANCROFTIANS' EDUCATIONAL DEVELOPMENT FUND

Application for assistance

INTRODUCTION

The fund provides financial support to Old Bancroftians and Bancroftians who wish to undertake educational or development activities which they might not otherwise be able to afford and for which other funding is not available. The information in the form, including details of income, are needed in order to decide which applications to support and in what measure.

However, the form cannot cover everything and applicants are also requested to submit a separate covering letter giving any further context or information regarding the application, but especially their reasons for taking part in the activity, its relevance to their education or future career intentions and the benefits they hope to derive from participation.

INSTRUCTIONS

- Please submit the form and covering letter as separate PDF documents to the e-mail address provided. If the form has been completed by hand, please include the information in the green section below in your e-mail so that it can be cut and paste.
- All applications forms are checked and reviewed by the Secretary of the OBEDF to whom OBs should address any questions. However, the Head's nominee on the committee (a current member of staff) is the initial contact for current pupils since and their parents. Their e-mail addresses are on the OBEDF website at <https://obedf.bancrofts.org/obedf-web-site>
- The Committee meets only four times a year. Applications forms need to be completed (and checked) prior to the meeting. Please ensure you have discussed with the either the Secretary or the Head's nominee the deadline for submission. Incomplete or unchecked forms will not be tabled at meetings.
- Instructions are provided for some of the colour coded section. Please read them carefully.
- If you are completing the form electronically, please ensure you use the *Fill & Sign* tool in Adobe Acrobat Reader. Simply typing in the form without turning on the tool appears easier, but usually ends in failure and frustration!
Please note that as you type the font size reduces. This is normal, even though the appearance of different font sizes on the same page may appear strange.
- If you run out of space in answering any question, there is a box on the last page of the form for continuing answers.
- Complete all the information, unless it is marked "[OBs only]" or "[Pupils only]"
- Please sign all boxes highlighted in blue.

If the applicant is dependent on their parents or guardian (see next page), the parent/guardian should sign all boxes highlighted in green.

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Application for assistance

IS THE APPLICANT DEPENDENT?

Most applicants will not need to answer because we will assume the answer in line with the most common circumstances. Specifically, we will assume that:-

- a) A current pupil is dependent on their parents/guardian.
- b) An OB who is applying for an activity that precedes completion of their first degree (or equivalent for those not pursuing degree level education) is dependent on their parents/guardian.
- c) An OB who is applying for an activity that follows completion of their first degree (or equivalent for those not pursuing degree level education) is not dependent on their parents/guardian.

If the assumptions above do NOT cover your circumstances adequately, please indicate below whether you are dependent on your parent/guardian or not and briefly outline the circumstances.

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Application for assistance

DATA PROTECTION

- The data in this application, and any data you provide to support of it, will be treated confidentially and the details revealed to others only in order to decide whether to support your application and in what measure. After your application has been considered by the Fund, the data will also be used by us to meet our various reporting requirements, and may be referred to in order to ensure fairness and consistency in processing future applications (made either by you or by others in similar or analogous situations to you). The data would also be used to investigate and respond to any cases where the accuracy and completeness of the data provided comes into question.
- The data will be made available to the Committee members who consider applications and to those who attend its meetings (including the school's Head, the Fund's auditor and the President of the OB's Association) and also to the school's admin staff in order to confirm the applicant's school record. It may also be discussed with others including the school's academic or administrative staff.
- We are aware of the need to protect confidential data and take reasonable measures to do so. However, you must be aware that the Fund is run by volunteers, that we rely on computer and communication products aimed at the consumer market, store data in the school's computer systems and archives and meets at Drapers' Hall, to where documents for meetings are carried. In short, the Fund does take its responsibilities seriously, but we have neither the resources nor the secure premises that large commercial organisations have.

The GDPR requires us to supply you with the following specific information.

Identity and contact details of the controller.	The controller is the Trustees of the OBEDF who can be contacted via the Secretary of the OBEDF (for Old Bancroftians) or the Headmaster's nominee on the OBEDF committee (for current pupils). These are the same people to whom you will send this application form.
Purpose of the processing and the lawful basis for the processing	The purpose of the processing is described in the first paragraph above. The lawful basis for considering the application is, of course, your request (i.e. consent) to do so. The lawful basis for the uses subsequent to considering the application are various legal requirements imposed by, for example, charities legislation, tax and accounting laws and by the requirement of the GDPR to process all applications fairly. As a result, your consent is not required for this processing.
Categories of personal data	Applications and other data you supply in support of them are considered together as a single category of data.
Any recipient or categories of recipients of the personal data	See the second paragraph above.
Retention period or criteria used to determine the retention period	The period for which your data will be retained will vary as our experience of the need to refer to previous applications evolves. It is likely to be a period of 6-10 years. The minutes of the Committee's meeting (which typically contain a very high level summary of your application and may contain some details from it) are kept in perpetuity as a historical record.
The existence of each of data subject's rights	You have a number of rights pertaining to the data which are detailed here . If you do rectify the data in your application after an award has been made to you, it is possible that the Fund will seek to recover the award if the rectified data would or may have affected our decision to make that award or its nature or amount.
The right to withdraw consent at any time, where relevant	You may withdraw your application (and hence your consent) at any time prior to it being considered by the Fund. After that, as explained above, our use of your data is required by law and your consent is not required and so withdrawing your consent will likely have little or no practical impact.
The right to lodge a complaint with a supervisory authority	You have the right to complain as explained here .
Whether the provision of personal data part of a statutory or contractual requirement or obligation and possible consequences of failing to provide the personal data	Making an application is entirely your choice. If you fail to provide the required data your application will likely be rejected.

I confirm that I have read and accept the above:-

Applicant:		Date:	
Parent/Guardian:		Date:	

OLD BANCROFTIANS' EDUCATIONAL DEVELOPMENT FUND
Application for assistance

LEGAL NOTICES

- Any activity for which a grant is awarded is undertaken entirely at the applicant's risk. In awarding a grant the Trustees of the Educational Development Fund do not imply approval of any other organisation nor do they accept any liability for any activity undertaken by the recipient whilst benefiting from a grant.
- The information on income provided by applicants and (where applicable) their parents/guardians is relied on in deciding almost all applications. It is important that it is accurate and complete. Documentary support and verification for all income data supplied may be requested but does not need to be submitted with this form.

In cases of doubt as to the relevance of any financial information, please indicate the doubt below.

I confirm that I have read and accept the above:-

Applicant:		Date:	
Parent/Guardian:		Date:	

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Application for assistance

DETAILS OF APPLICANT

Full name			
E-mail			
Home address			
Postcode		Telephone	
Address for correspondence (if different)			
Postcode			

DETAILS OF PARENT/GUARDIAN

➤ Complete only if applicant is dependant

Full name			
E-mail			
Home address			
Postcode		Telephone	

OLD BANCROFTIANS' EDUCATIONAL DEVELOPMENT FUND
Application for assistance

CURRENT SITUATION OF APPLICANT

Which of the following is your current situation:			
<input type="checkbox"/>	Current pupil	Current form:	
<input type="checkbox"/>	Degree	Institution:	
		Level (BA, MSc etc.):	
		Course:	
		Dates (MM/YY to MM/YY):	
<input type="checkbox"/>	Employed or self-employed	Employer:	
		Role:	
		Dates employed:	
<input type="checkbox"/>	Other	Details:	

<p>Summary of your other relevant education, development or employment history since leaving school [OB only]</p>	
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Dates (years) at Bancroft's.	
Eventual career intentions	
<p>Have you applied to the OBEDF before? If so, give full details.</p>	

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Application for assistance

PURPOSE FOR WHICH ASSISTANCE SOUGHT

Organising body			
Websites (if any) on which further background can be found.			
Name and e-mail of organiser of school trips [Pupils only]			
Description of course or activity and its location.			
Dates of participation			
If successful, by what date is funding required, or if costs are payable by instalments, give details of dates when payments are due.	Comments	Date	Amount

BANK ACCOUNT DETAILS

Awards made to current pupils for activities (e.g. school trips) which are organised by the school will be paid direct to the school. In all other cases, please complete the details below of the bank account into which any award should be paid.

Name of account owner:	
Sort code (omit spaces and hyphens):	
Account number:	

OLD BANCROFTIANS' EDUCATIONAL DEVELOPMENT FUND
Application for assistance

EXPECTED COSTS

- If fees include travel and or subsistence, please enter total in the *Tuition/participation fees* box and enter "Included above" in the other boxes.
- Please breakdown costs on the lines provided.
- Indicate estimated or already paid fees with an 'x'
- If fees are denominated in foreign currency, enter the £ equivalent and provide the exchange rate used in the *Comments* section.

	Description of expense	Amount	Estimate?	Already paid?	
Tuition/participation fees					
Sub-total					
Travelling expenses					
Sub-total					
Subsistence					
Sub-total					
Other					
Sub-total					
TOTAL					

Comments	
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Application for assistance

FUNDING

- If the funding is reasonably certain, enter the amount of funding under *Amount* and use an 'x' to indicate if the amount is estimated.
- If funding is uncertain, insert the amount of possible additional funding under *Possible additions*. If, for example, a loan of £1k-£4k is expected, enter "£1k" under "*Amount*" and "£3k" under '*Possible additions*'.
- *Shortfall* is simply the difference between the cost on the previous page and the funding on this page.

	Description or comments	Amount	<small>Estimate?</small>	Possible additions
Personal				
Sponsorship, awards or other funding				
Parental or family contribution or loans				
Loans				
Other (specify)				
Total				

Shortfall		
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Other sources of funding/sponsorship approached unsuccessfully		
What will the applicant do if the OBEDF cannot provide adequate financial assistance to meet the full shortfall ?		

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Application for assistance

PERSONAL & FAMILY CIRCUMSTANCES

- Parental/guardian details/income are required only if the applicant is dependent. The parent/guardian should be the person whose details are given in the green section of this form.
- Under *Family circumstances* please include whether the applicant and/or parents/guardian:-
 - are single or married/in a partnership,
 - are divorced/separated from their partners,
 - are employed, self-employed, in full time education, or otherwise
 - the number of dependents they have (including the applicant) and how many of the dependants are in higher education and how many in employment.
- If the applicant or parent/guardian is divorced/separated the amount of any settlement with their (former) partner, whether formal or informal, should be included under the partner's 'other' income.
- For income details please enter "Nil" if the amount is less than £100 per annum or "N.A." in columns that are not applicable. Do not leave any box with a '£' sign blank.

	Family circumstances
Applicant	
Parents/guardian	

ANNUAL INCOME (before tax)

		Applicant		Parent/guardian	
		Self	Spouse or partner	Self	Spouse or partner
Employment	Job/employer				
	Amount	£	£	£	£
Self-employment	Nature of business				
	Amount	£	£	£	£
Pension		£	£	£	£
Benefits		£	£	£	£
Investment income		£	£	£	£
Other income of any nature		£	£	£	£

	Details	Amount outstanding	
Outstanding student (or other) loans.			

Other comments, including unusual costs borne or explanations of details above.	
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I confirm that the above information is accurate and complete: -

Applicant:		Date:	
Parent/Guardian:		Date:	

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Application for assistance

ASSISTANCE WITH PROMOTING THE OBEDF

The OBEDF has created a Facebook page, aimed at raising our profile among both current pupils and OBs. The intention is to attract the attention of and enthuse other potential applicants and donors.

We would like to post an 'announcement' of an award if one is granted to you. There are three possible ways of doing this. In order of how effective they are likely to be, they are:-

- A. Sharing the news, ideally with some photos, using only photos and messages supplied by and agreed by you, but with you clearly identified.
- B. Sharing the news, ideally with some photos, using only photos and messages supplied by and agreed by you, but in an anonymous form.
- C. A simple announcement in very general terms, with no identification of you.

Option preferred	
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[Pupils only]: With whom should the OBEDF liaise on the facebook Post? Tick one. A) The applicant (pupil). B) Their parent/guardian.	Tick one chosen option.
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I confirm that I am aware of the above response: -

Parent/Guardian:		Date:	
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HELP IN MEASURING THE EFFECTIVENESS OF OUR COMMUNICATIONS

Could you please let help us track the effectiveness of our communications:

How did you first hear about the OBEDF ?	
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Application for assistance

CONTINUATION OF ANSWERS FROM ABOVE

If you have run out of space in any answer above, please continue below.

DECLARATIONS

- I hereby apply for financial assistance from the Old Bancroftians' Educational Development Fund to enable me to undertake the activity specified. I declare that the information provided is complete and accurate.

Applicant:		Date:
	Print name:	
Parent/Guardian:		Date:
	Print name:	