**CONFIDENTIAL**

FINANCIAL ASSISTANCE APPLICATION FORM

2023–24

**UNDERGRADUATES**

**(PLUS PGCE AND CLINICAL MEDICINE STUDENTS)**

**COLLEGE HARDSHIP FUND**

This is resourced by the College itself, and applications may be made by undergraduates, home and overseas. It can make loans and/or award grants.

Applications should be sent to the College Office by email ([college.office@queens.ox.ac.uk](mailto:college.office@queens.ox.ac.uk)) by **Wednesday of 1st or 5th weeks** of each Term. The Student Finance Committee meets in 3rd and 7th week of each Term, but in cases of emergency the Committee can act earlier.

*The information provided on this form will be held in strict accordance with provisions of the Data Protection Act 1998 and as such will be treated in the strictest confidence, kept securely and not disclosed to third parties, except as set out below. It will be used by college officers in determining whether or not the applicant should receive financial assistance.*

**OTHER SOURCES OF HARDSHIP FUNDING**

Please review the University pages on financial assistance: <https://www.ox.ac.uk/students/fees-funding/assistance>

The application form for the Oxford Hardship Fund will be circulated by the College Office early in the academic year.

**HOW YOUR APPLICATION IS ASSESSED AND SOME KEY POINT TO NOTE**

These notes are aimed at helping you assess for yourself whether it is likely that you may be awarded a grant and/or loan from the College, such that you do not have to submit what is quite intrusive information if it is unlikely that you will receive financial assistance.

* Financial assistance is aimed at supporting students whose circumstances have changed, such that they have an unexpected increase in expenditure and/or decrease in financial funding. Please comment on any changes in circumstances in your accompanying statement.
* Grants and/or loans made by the College to an individual student are usually less than about £3k in total in any one academic year.
* Grants are usually only awarded in cases where hardship is demonstrated (see below for how this is determined).
* Loans can be awarded when hardship in a particular academic year has not been demonstrated, but when there is a cash-flow issue i.e. a temporary lack of funds.
* Hardship is demonstrated when total available funds are less than total expenditure.
  + NB. Total available funds includes assets such as savings and any available overdraft/credit facilities.
  + Expenditure should be realistic and acceptable given the particular circumstances of the individual student.
* Bank statements are required to verify your financial position, and to check that expenditure is realistic and acceptable. If a pattern of overspending is identified, financial advice can be given via your nominated member of the Governing Body.
* Award of a grant and/or loan should make it financially viable for you to complete the academic year.
* The College does not fund private health-care unless it is directly related to a registered disability and not eligible for funding via your Disabled Students’ Allowance (DSA).

***PLEASE COMPLETE IN BLACK INK AND CAPITAL LETTERS***

Declaration: I agree to this application being considered and viewed by Junior Members of the Student Finance Committee (Please circle one).

**YES NO**

NB: Indicating that you do not wish the Junior Members of the Committee to review your application will in no way jeopardise your application.

**SECTION 1: PERSONAL DATA**

NAME: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

COURSE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ YEAR OF STUDY: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

AGE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Do you live in college accommodation? YES/NO

If not, please give reason why: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Do you have any disability which gives rise to additional expenditure? YES/NO

[If so, please give details in section 3, below]

PERSONAL TUTOR or other Member of GB who you wish to represent you:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**SECTION 2: ELIGIBILITY**

Are you eligible to take out a UK Government Student Loan in 2023/24? YES/NO

*[Student Loan Company Loan]*

What is the maximum amount you are eligible for? £ \_\_\_\_\_\_\_

What is the total amount you have applied for? £\_\_\_\_\_\_\_\_

**If you have taken out a Government Student loan, please enclose evidence.**

Have you applied for a Tuition Fee Loan? YES/NO

What is the total amount you have applied for? £ \_\_\_\_\_\_\_

Do you receive a Higher Education grant? YES/NO

If **YES**, how much do you receive? £\_\_\_\_\_\_\_

Have you, in this academic year, already received financial assistance from

either the College or the University? YES/NO

If **YES**, how much: £ \_\_\_\_\_\_\_\_

Do you get any remission of the University Tuition Fee? YES/NO

If **YES**, how much of the Fee is remitted (i.e. paid by your LA, SAAS, ELB)) £\_\_\_\_\_\_\_\_

Do you receive an Oxford Opportunity Bursary/Crankstart Scholarship YES/NO

If **YES**, how much will you receive for this academic year? £\_\_\_\_\_\_\_\_

Have you received financial assistant from the College in the past? YES/NO

If **YES**, how much and when did you receive the financial assistance? £\_\_\_\_\_\_\_

**SECTION 3: EXPENDITURE**

Please give costs ***per annum***. Where possible base costs on past or current bills. The estimates are given by way of comparison; if your estimates are very different please explain why in section 8

|  |  |  |
| --- | --- | --- |
| **Essential Expenditures (annual)** | **Your Costs** | **Estimates** |
| Term time rent [*supply evidence if not in College accommodation*] |  | *£ 4749\** |
| Electricity/gas/water [*included in rent for College rooms*] |  | *£* |
| Meals [*estimate is based on all meals taken in Hall*] |  | *£ 1998.10* |
| Other items of food/clothes/personal hygiene/telephone *(£35pw x 26 wks)* |  | *£ 910* |
| Other costs associated with your course: eg books, photocopying |  | *£ 250* |
| Travel to and from home |  | *£ 250* |
| Any other essential expenditure *please specify:* |  |  |

\**undergraduate rate*

|  |  |  |
| --- | --- | --- |
| **Discretionary Expenditures** | **Your Costs** | **Estimates** |
| Vacation rent [*estimate is based on two weeks undergraduate rate*] (£18.55 per night) |  | *£ 259.70* |
| Do you face any other expenses you feel should be taken into account? e.g. extra medical expenses. Please specify. |  |  |
| Participation in University activities/social events |  | *£ 506* |
| **Sub-Total** | **£** |  |

**TOTAL OF Essential AND Discretionary Expenditures: £**

**University and College Fees: How much of your fees are not covered by other sources? e.g. Research Council, NHS, Tuition fee loan. £**

**SECTION 4: INCOME**

*Please give income* ***per annum (July 2023 to June 2024 – include any vacation earnings)***

|  |  |
| --- | --- |
| Expected earnings for this year from July 2023 i.e. last summer vacation plus Christmas and Easter vacations. |  |
| Net earned income : partner |  |
| Parental/guardian contribution *(excluding the fees they pay on your behalf)* |  |
| Student Loan Company Loan |  |
| Government Access to Learning Grant |  |
| College/University bursary or scholarship/exhibition |  |
| Oxford Opportunity Bursary /Oxford Bursary |  |
| HE Maintenance Grant |  |
| NHS bursary *(Clinical Medicine)* |  |
| PGCE trainee salary |  |
| Assistance from Secondary Shortage Subject Scheme *(PGCE students)* |  |
| Assistance from any other grant-giving body *please specify* |  |
| Any other sources of income, eg private income from investments, trusts property rental, loans, support from partner, etc *please specify* |  |
| **TOTAL INCOME:** |  |

**SECTION 5: ASSETS AND LIABILITIES**

**Assets:**

|  |  |
| --- | --- |
| Bank or Building Society Savings Accounts |  |
| Investments at market value |  |
| Property *(including principal residence)* estimated current value |  |
| **TOTAL ASSETS:** | **£** |

**Liabilities:**

|  |  |  |
| --- | --- | --- |
|  | **£** | **Repayments start date** |
| Bank/Building Society **overdraft limit** |  |  |
| Bank/Building Society **current balance** |  |  |
| Credit card(s) **limit** |  |  |
| Credit card(s) **current amount outstanding** |  |  |
| Amount of any other outstanding debts (excl. Student Loans) (*please specify)* |  |  |
| **TOTAL LIABILITIES:** | **£** |  |

**Please provide evidence of Bank/Building Society account balances and credit card debt statements for the past two months.**

**SECTION 6: ASSISTANCE APPLIED FOR**

Please indicate the amount of assistance you are seeking: £\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**SECTION 7: DECLARATION**

Please read and sign the following statement:

I confirm that all the information I have given in connection with this application is full and correct. I undertake to supply any additional information which may be required by the Student Finance Committee in order to verify the details given. I also undertake to inform the Student Finance Committee (without delay and without prompting) of any significant changes to the financial details given in the application.

**SIGNED: DATED:**

**SECTION 8: SUPPORTING STATEMENT**

Please provide a supporting statement below giving any additional information about your financial position including any special circumstances. (This section will be removed if the application is supplied to the auditors)

***Failure to provide a supporting statement may mean that the Committee cannot give full consideration to your application. (Please refer to the guidelines when completing this section)***

**SECTION 9: PERSONAL TUTOR’S COMMENTS/ COMMENTS FROM OTHER MEMBER OF GB** (Please refer to Tutors’ guidelines)

Please return this form to the College Office ([college.office@queens.ox.ac.uk](mailto:college.office@queens.ox.ac.uk)) by Wednesday of 1st Week or Wednesday of 5th Week

**SECTION 10: DECISION (FOR COLLEGE USE ONLY)**

Queen's College Loan £ Queen's College Grant £

(Terms of repayment):

Authorised by: Date: