



## **Access to Learning Fund – Application form guidance notes 2011-2012**

By reading and following these notes carefully you will be able to accurately complete your application to the fund. Please note funds are limited and an award is not guaranteed.

### **Processing of your application**

- We aim to process your application within 3-4 working weeks of receiving a completed application - incomplete applications cannot be accepted. If you are in immediate financial difficulty seek advice / an emergency loan from us.
- Do not wait until you have no financial support before making an application - you do not need to be in immediate financial difficulty. Applications can be accepted at any time throughout the academic year.
- For end of year application deadlines see: [www.lancs.ac.uk/sbs/funding/alfdeadlines.htm](http://www.lancs.ac.uk/sbs/funding/alfdeadlines.htm)
- If you are in immediate financial difficulty with no other source of immediate income please speak to your college secretary about a college loan, alternatively make an appointment to speak to a student funding assistant in the Student Funding Service about an emergency loan.

### **How to complete the ALF application form**

To allow us to process your application quickly it is essential that **all** supporting documentation is enclosed with your application form. Do not provide original documents - photocopies are needed as we retain documents for audit purposes. Applications that do not have photocopies of supporting documents will be rejected.

Answer all questions by **printing clearly in black ink** or by ticking the appropriate box.

### **Part 1 - Personal Details** - Complete all sections

- Q1. This is the number given on the front of your library card
- Q2. Please enter your title
- Q3. Include all first names in full
- Q4. Enter your family name (surname) in full
- Q5. Please enter your date of birth as DD/MM/YY (e.g. 27/03/93)
- Q6. This is the address you want correspondence relating to your application sent to – this will usually be the address at which you reside during term time.
- Q7. Please enter your home address (if you live with your parents during holidays please tick the box to say you would like letters to be sent there during this time)
- Q8. Please give us a contact number for your term time address. This will help us to contact you if there are any additional questions regarding your application.
- Q9. If you have a mobile telephone number, please include this.
- Q10. If we send you an e-mail it will automatically be sent to your University e-mail address. If you wish it to be sent to a non-University address please enter this.
- Q11. Please indicate whether you are single, living with parents, or living with a partner.
- Q12. This is the number of other adults who live within your property (don't count yourself)

### **Part 2 - Course Details** - Complete all sections.

- Q13. Please give the course title and your level of study
- Q14. Please give the date your course starts and ends
- Q15. Tick the relevant box to indicate your current year
- Q16. Please tick final to indicate if this is a repeat year
- Q17. Please tick final to indicate if this is your final year
- Q18. If your course has any compulsory element involving extra costs please tick yes and give details of the module(s), item (e.g. field trip) and cost. For us to consider these additional costs they have to be a compulsory and verified by your tutor or departmental secretary.
- Q19. If your course has a period of work placement in this academic year please give details, including where and when the placement takes place and the associated costs of your placement. Please state whether you get paid for any period of work and whether any help is received toward your extra costs, either from your employer or your department. Please ask your tutor or departmental secretary to verify this section. (If you are on your year abroad

and applying from overseas please enter "Year Abroad" in the section 18 box.).

### **Part 3 - Dependants**

Complete this section giving details of any children and/or adults who are financially dependant on you. Students with dependants may be asked to attend an interview.

- Q20. Children (under the age of 18) who are financially dependant on you should be listed.  
Q21. Adults who are financially dependant (such as a non working partner/spouse) should be listed.

### **Part 4 - Disability/Special medical needs**

- Q22. Indicate whether you have any disability or medical condition.  
Q23. If you have applied for DSA please tick yes. If you would like information on DSA see:  
[www.lancs.ac.uk/student-services/funding/dsa.htm](http://www.lancs.ac.uk/student-services/funding/dsa.htm)  
Q24. Students who have, or suspect they may have, dyslexia may wish to take a preliminary diagnostic test, prior to applying for a Disabled Students Allowance. Assistance in meeting a proportion of this cost may be provided through Access to Learning Fund without a full application. Please contact a Student Advisor for further details. If there are other costs associated with your disability, which are not covered by DSA, please detail these.

### **Part 5 - ALF publicity source**

- Q25. To help us target publicity please tell us how you became aware of the fund.  
Q26. Please note you will receive a letter giving the result of your application and an email to confirm any award payment by BACS.

### **Part 6 - Bank / Building Society / Savings / Credit Card Details**

Any award will be paid by BACS (Banks Automated Clearing System) into your nominated University Direct Credit Account. You must nominate an award account in advance of submitting your application by visiting the secure webpage listed at:  
[www.lancs.ac.uk/sbs/funding/account.htm](http://www.lancs.ac.uk/sbs/funding/account.htm) - Please ensure this account can accept BACS payments and tick the box on the application to confirm you have completed nomination.

If an award is made from ALF it will be paid by BACS into your nominated account. Give your OD limit and your current balance for each account. Note that under the ALF regulations you are required to have interest free facilities available to you, although you do not need to have reached any overdraft limit before applying for help. If you do not have an overdraft facility, please enquire about one at your bank before applying to the Access to Learning Fund. If you are unable to obtain an overdraft facility you must provide a letter from your bank as proof and we will take this into consideration in your assessment.

**You must submit photocopies or official duplicates of your last three month's bank / building society statements for all accounts you hold, together with a balance slip if your last statement was issued more than 3 weeks ago.** If you have not retained your old bank statements your bank may charge for issuing duplicates. If they do, it is your responsibility to meet these costs, if you have on-line banking you may be able to print off the relevant 3-month bank account records free of charge.

If you have an account that is no longer in use, please provide a statement which shows a current balance. When you have your statements please go through them and explain any credits or debits over £100 where this is not clear – for example unidentified income transfers to your account.

Please enter balances for credit cards for information but DO NOT provide statements. Your level of credit card debt does not have a direct impact on the outcome of your assessment, unless you are a mature student who had pre-existing debts which have been consolidated prior to coming to University. If this is the case please make an appointment to see a student adviser.

### **Part 7 - Debts to the University**

- Q27. Please list any University debts e.g. library fines, rent, college loans or Student Services emergency loans that you have outstanding. Do not list tuition fee debts.

### **Part 8A, 8B, 9 - Income and Expenditure**

It is important that you fill in these sections as accurately as possible. Please note that the figures you present should be **per week**. You should divide any student support income by the appropriate period of assessment (**POA**) – 39 weeks if you are a single student, 43 weeks if you have any dependants or 52 weeks if you are postgraduate. Remember if you are undergraduate that you need to provide your proof of your funding entitlement (student funding assessment) and Student Loan Company payment schedule letter - showing that the full loan entitlement has been taken out - we cannot accept your form without these items.

## Part 8A - Student's Income per week

**a. Student Loan** - You must have taken out the maximum loan that you are entitled to before receiving help from the Access to Learning Fund. If you are an undergraduate student, divide your student loan income by the relevant number of weeks. For example a single student would divide their loan by 39 weeks. A single parent with 2 children would divide the student loan and other grants (e.g. PLA, childcare grant etc) by 43 weeks.

**b. Higher Education Maintenance Grant (HEMG)** - If you receive a HEMG enter the amount you receive and divide it by the appropriate period of assessment.

**c. Parents (or partners) assessed contribution to living costs** - If your parents/partner chooses not to be financially assessed they will be expected to pay you the means tested element of the student loan. If they are financially assessed and required to contribute to living costs, as they earn above the relevant threshold, this will be shown on your financial notification. If you get less than the full student loan your parents should make up the difference. You should divide the amount they are assessed to pay by the relevant number of weeks and enter it in this box. Please confirm in your personal statement (Part 10) the amounts received and say how it is paid. (i.e. yearly, termly, monthly, etc.).

**d. Dependants Grant** – Please divide additional grants (e.g. parents learning allowance / childcare grant) by the relevant number of weeks and enter the weekly figure.

**e. Other Awards** - If you receive a University award please enter the weekly amount in the appropriate box. You do not need to provide evidence of these awards.

If you receive any other award (see examples below) enter the award name in the box labelled 'other grant'. and weekly value in the income box. Ensure you provide evidence detailing the award source and amount.

a) Welsh Assembly Learning Grant  
d) Mature Student Bursary from Scotland  
g) University College award

b) N. Ireland grant  
e) NHS Bursary  
h) PG Access Bursary

c) Young Persons Bursary from Scotland  
f) GSCC bursary  
i) Peel / Cartmel / County Studentship(s)

**f. Savings** – Please enter the total amount of savings (capital) you hold (if any) and give the weekly income from this capital in the weekly income box.

**g. DSA** – If you receive a disabled students allowance please enter the weekly income you receive. This income is not counted in your assessment and is for information only.

**h. Postgraduate Funding** – Regulations require you to have made “reasonable provision” to fund your postgraduate study, including taking out a career development loan / professional studies loan where you are eligible. **We do not support students who have clearly failed to properly budget for the full costs of their course, but can consider help towards costs that could not have been foreseen.** If you receive funding for your postgraduate study please state what type of income this is (e.g. Professional Loan / CDL / ESRC etc) and give the annual amount. Please enter the equivalent weekly amount in the correct box.

**i. Earnings** – Please note for single undergraduate students we apply an “assumed” level of income. Actual income from employment does not have a direct effect on the outcome of your assessment.

**j - q. Benefits** – If you receive any of these (e.g. child tax credits) please enter the weekly amount in the correct box. You **must** supply a copy of any award documentation (including all pages).

**r. Child maintenance** – If you receive income from an ex-partner for children who live with you please enter this income.

**s. Other income** - Please include any other income you have and specify what that income is. All income shown on your bank statements should be accounted for.

**t. Sub-Total Income** - Enter a sub total for section 8A (student income) in the box.

## Part 8B - Partner's income

If you have a partner, who is living with you, please indicate any income they have and provide evidence (e.g. P60 or salary slip). If they have other income (e.g. from savings, pension or benefits) please detail this and provide official evidence. Add together your income under 8A and your partner's income under 8B and put this figure in the overall total box.

## Part 9 – Expenditure

Include expenditure that you (and your partner if applicable) have on a weekly basis. Where your expenditure is not weekly calculate the weekly amount. For example if you pay bills on a quarterly basis then you should multiply

**these by 4 and divide by 52. If you pay every calendar month (31 days) then you should multiply the amount by 12 and divide by 52 (e.g. rent). If you pay every 4 weeks (28 days) multiply by 13 and divide by 52, etc.**

**a.** Provide your weekly rent amount (divide the total rent paid by the number of weeks that your contract covers) and supply a copy of your contract for your private accommodation or a mortgage statement. **If you are on campus you do not need to provide evidence of your weekly rent.**

**d.** Composite Living Cost (CLC) – under Government ALF regulations we use a composite living cost which varies depending on whether you have children. The CLC covers utility costs, contents insurance, TV licence, food, household/laundry expenses and social spending. As this amount is fixed you do not need to provide evidence of any of these costs. **You should enter the amount given in brackets next to the box(s) which describe you.** For example if you are a single student enter £69 in that box. If you are a lone parent with two children enter £69 in the lone parents box, followed by £18 in the family premium box and £128 (2 x £64) in the child premium box.

**g - k.** Travel Costs – car costs are only allowed for students with children, a disability or on placement. For single students we use a fixed allowance per week towards public transport and other occasional travel costs. (e.g. end of term travel home). If you are a single student complete box h, otherwise complete box i, j and enter the fixed allowance for car tax / maintenance in box k.

**l.** Books/Equipment - We use a fixed allowance of £6.00 per week towards books /equipment – enter this in box l.

**m.** Disability Costs – please provide details of costs not covered by DSA.

**n.** Tuition Fees – enter tuition fee amount if Postgraduate only.

**o.** Ensure you enter a total amount in the total expenditure box.

## **Part 9B – One off exceptional / unexpected expenditure**

We can consider help towards any exceptional / unexpected costs. E.g. emergency dental treatment or costs associated with an unexpected injury or unexpected travel home or to another location. Please enter the costs in box p and give further details in your supporting statement (see below).

## **Part 10 - Supporting Statement**

Q28. You must submit a supporting statement, explaining the reason(s) for applying.

Your bank/building society statements will be used to verify major income and expenditure items. Please note that we do not significantly help students who have simply failed to budget or spent irresponsibly. We may be able to provide assistance to those who have some shortfall between their income and expenditure.

## **Part 11 - Confidentiality and Data Protection**

Please read carefully – all the information you supply is confidential.

## **Part 12 – Declaration**

Please tick all the relevant boxes that apply to your circumstances and remember to sign and date your application form. On the front page of the form is a list of documents you will need to photocopy and submit with your completed application form. If any evidence is missing we cannot accept your application. For a sample assessment see: [www.lancs.ac.uk/sbs/funding/alfeg.htm](http://www.lancs.ac.uk/sbs/funding/alfeg.htm)



## Access to Learning Fund (ALF) Application 2011-2012

- Read and follow the accompanying guidance notes carefully, so that you correctly complete this application form.
- Complete the checklist below and provide photocopies (not originals) of the required official documents.
- **You must nominate a direct credit account before submitting this form (part 6) failure to do so will delay any award.**

### Checklist – tick to indicate the relevant items have been included.

#### Income

- Student Funding Notification (all pages)
- Breakdown of Dependants' Grants (for parents)
- Evidence of all state benefits (e.g child tax credits)
- Evidence of child maintenance (if received)
- Postgraduates – evidence of funding  
(e.g. ESRC letter; PCDL agreement etc)

#### Expenditure

- Last 3 months Bank/Building Society statements
- Evidence of rent / mortgage (if off-campus)
- Evidence of childcare costs (if applicable)
- Evidence of Council Tax (if applicable)
- Evidence of car insurance costs (where allowed)
- Evidence of one off expenses / mandatory field trips

## Part 1: Your personal details

1 Library Card number

2 Your title (tick **one** box only)

Mr       Mrs       Miss       Ms

3 Your first name(s) (in full)

4 Your surname (in full)

5 Your date of birth (DD/MM/YY)

DD / MM / YYYY      Age     

6 Your full **correspondence** address

  
  
  
 Post code      

7 Your full **home** address

*Please tick to send here during vacation*

  
  
  
 Post code      

8 Telephone:

9 Mobile tel:

10 E-mail address

Please print clearly

### Personal status/Accommodation details

11 Status  Single (living alone)  with your partner or spouse?



Single (in shared accommodation)  with your parents or guardian?

12 *If single in shared accommodation* How many other adults live at this address?

### Part 2: Course details

13 Degree Title   Undergraduate  Postgraduate

14 Course start date  Course end date

15 Year of course  1  2  3  4  5

16 Is this a repeat year?  Yes  No

17 Is this your final year?  Yes  No

18 Does your course involve any compulsory element involving extra costs? (e.g. field trips etc) in this academic year?  Yes  No

If yes, please give details of the course module(s) item and additional cost.

Please ask your course tutor or departmental secretary to verify the above by printing their name and extension number in this box

19 Does your course involve a placement in this academic year?  Yes  No

If yes, (e.g. GSCC courses) please give details of where and when this takes place with approximate costs. Please also detail any pay or help with costs.

Please ask your course tutor or departmental secretary to verify the above is accurate.

### Part 3: Your dependants

20 Do you have any children who are financially dependent on you?  No

Yes > Please give details

Full name(s)	Date of birth	Age

21 Do you have any adults who are financially dependent on you?  No

Yes > Please give details

Full name(s)	Date of birth	Age

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### Part 4: Disability/Special medical needs

- 22 Do you have a disability or chronic medical condition?  Yes  No
- 23 Have you applied for Disabled Students' Allowance (DSA)?  Yes  No
- 24 Do you wish to apply for any financial assistance towards any special equipment/material not covered by DSA  
If 'yes', please give details below.  Yes  No

### Part 5: ALF information source

- 25 How did you hear about ALF?  Friend  Poster  Applied Previously  University website  LUSU
- Email from Student Services  SCAN  Tutor/Dept  Student Services Advisor  Leaflet
- 26 Please refer to the guidance notes regarding communication of the result of your application and important requirements regarding the nomination of an award account below.

### Part 6: Bank / Building Society / Savings / Credit Card details

Any award will be paid by BACS (Banks Automated Clearing System) into your nominated University Direct Credit Account. You must nominate an award account **in advance** of submitting your application by visiting the secure webpage listed at: [www.lancs.ac.uk/sbs/funding/account.htm](http://www.lancs.ac.uk/sbs/funding/account.htm)  
Please ensure this account can accept BACS payments and tick the box to confirm you have completed nomination.

	Name of Bank / Building Society	Type of account <i>i.e. current, savings or credit card</i>	Account number	Sort Code <i>(AND roll number if building society)</i>	Overdraft facility £  <i>See guidance - part 6</i>	Balance of account £  <i>(indicate if debit [DR] or credit [CR])</i>
1	<div style="border: 1px solid black; height: 25px;"></div>	<div style="border: 1px solid black; height: 25px;"></div>	<div style="border: 1px solid black; height: 25px;"></div>	<div style="border: 1px solid black; height: 25px; text-align: center;">_ _ - _ _ - _ _</div>	<div style="border: 1px solid black; height: 25px;"></div>	<div style="border: 1px solid black; height: 25px;"></div>
2	<div style="border: 1px solid black; height: 25px;"></div>	<div style="border: 1px solid black; height: 25px;"></div>	<div style="border: 1px solid black; height: 25px;"></div>	<div style="border: 1px solid black; height: 25px; text-align: center;">_ _ - _ _ - _ _</div>	<div style="border: 1px solid black; height: 25px;"></div>	<div style="border: 1px solid black; height: 25px;"></div>
3	<div style="border: 1px solid black; height: 25px;"></div>	<div style="border: 1px solid black; height: 25px;"></div>	<div style="border: 1px solid black; height: 25px;"></div>	<div style="border: 1px solid black; height: 25px; text-align: center;">_ _ - _ _ - _ _</div>	<div style="border: 1px solid black; height: 25px;"></div>	<div style="border: 1px solid black; height: 25px;"></div>

List all accounts held by you (and your partner if applicable) and ensure you supply photocopies of your last three month's bank statements for each bank account. We do not require credit card statements. The photocopied bank statements must show your name and bank details – mini statements are not acceptable. **You must explain on your statements any debits or credits over £100.** Applications submitted without relevant bank statements will be rejected.

### Part 7: Debts to the University (excluding tuition fees)

- 27 Do you have any University debts / college or emergency loans outstanding?  Yes  No Please specify (rent, loan, fine, etc.)

**In Part 8A, 8B, and 9 please follow the guidance notes carefully giving weekly figures**

### Part 8A: Student's income per week

		£ per week
a	Student Loan	:
b	HE Maintenance Grant	:
c	Assessed contribution to living costs	:
d	Dependants Grant(s)	:
e	University / Other awards	
	Lancaster Scholarship	:
	Lancaster Bursary	:
	Lancaster Subject Award	:
	Other award (list below)	
	<input type="text"/>	:
f	Savings <input type="text" value="£"/> <input type="text"/>	:
	<i>(including ISAs, Trust funds, B.Society accounts, etc. Ensure you list in Part 6)</i>	
g	DSA	:
h	Postgraduate Funding	
	<input type="text" value="Type"/> <input type="text" value="Amount per yr"/>	:
i	Net earnings	:
j	Income Support	:
k	Housing Benefit	:
l	Council Tax Benefit	:
m	Jobseekers' Allowance	:
n	Working Tax Credit	:
o	Child Tax Credit	:
p	Child Benefit	:
q	Disability benefits (specify)	
	<input type="text"/>	:
r	Child maintenance	:
s	Any other income (give source)	
	<input type="text"/>	:
t	<b>Sub-Total Income</b>	<input type="text"/> : <input type="text"/>

### Part 8B: Partner's income

u	Net earnings	:
v	Other _____	:
w	<b>Overall total (8A + 8B)</b>	<input type="text"/> : <input type="text"/>

### Part 9: Student's (and Partner's) expenditure per week

		£ per week
a	Rent (Annual £ <input type="text"/> )	:
	Rent contract-length in wks <input type="text"/>	
b	Mortgage (inc. endowment)	:
c	Council Tax	:
d	<b>Composite Living Cost (see guidance note)</b>	
	Single student (no children) (£69)	:
	Student with partner (£109)	:
	Lone parent (£69)	:
	Family Premium (£18 - where one or more children)	:
	Child Premium (£64 <u>per</u> child)	:
e	Building Insurances (excluding personal possessions)	:
f	Childcare costs	:
g	<b>Travel Costs (see guidance note)</b>	
h	Non-Car Travel (£7.00)	7 : 00
i	Car Travel - weekly (return) mileage to University	<input type="text"/>
j	Car Insurance per week	:
k	Car tax / maintenance (7.70)	7 : 70
l	Books/Equipment	6 : 00
m	Disability costs not covered by DSA	
	<input type="text"/>	:
n	Tuition Fees	
	(Only if postgraduate)	:
o	<b>Total expenditure</b>	<input type="text"/> : <input type="text"/>

### Part 9B: One off / unexpected expenditure

p	<input type="text"/>	<input type="text"/> : <input type="text"/>
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## Part 11: Confidentiality and Data Protection

Applications are seen only by relevant staff and will be treated as strictly confidential. Lancaster University is a data controller under the terms of the 1998 Data Protection. The Student Funding Service follows University policy in matters of data protection. The data requested in this form is covered by the notification provided by the University under the Data Protection Act. Personal data will be used solely in the department for statistical purposes and electronic records keeping.

The data will not be passed to any other third party without your consent, except when the University is required to do so by law. Any formal enquiries concerning the use of data noted here should be addressed to the Student Funding Manager, Colleges and Student Life, The Base, University House. For further details see: [www.lancs.ac.uk/sbs/all/dataprotection.htm](http://www.lancs.ac.uk/sbs/all/dataprotection.htm)

## Part 12: Declarations

- I certify that I fulfil the following criteria: (please tick the relevant boxes)

### Either

There are no restrictions on my stay and I am therefore \*settled within the United Kingdom.  
(ie, have the Right of Abode in the UK or have Indefinite Leave to Enter/Remain (ILE/R) in the UK.)  
(\*'settled' – on the first day of the first academic year of your course.)

### Or

I have been recognised by the UK Government as a Refugee and have Full Refugee Status/ILE/R as a result.

I have Exceptional Leave to Enter/Remain in the UK/Humanitarian Protection (ELE/R/HP).

I began my course of study before 1 September 1997.

I am the child/spouse of an EEA Migrant Worker

I am the child/spouse of a Swiss National

I am the child of a Turkish Worker

### Plus

I have been 'Ordinarily Resident' within the UK and Islands for 3 years immediately before the start of my course. (Anyone with ELE/R or anyone recognised by the UK Government as a Refugee should have maintained 'Ordinary Residence' from the date this status was granted).

### AND

- I confirm that I am supporting the children named in Part 2.
- I confirm that I am not living with a spouse/partner.
- I confirm that I am registered and in attendance on the course described in Part 2 of this form.

- I declare that the information that I have given on this form is correct and complete to the best of my knowledge.
- I understand that giving false information will automatically disqualify my application and may also lead to disciplinary procedures resulting in possible exclusion from the university. I further undertake to repay any grants obtained by me as a result.
- I agree to inform the Student Funding Service immediately if there are any changes in my circumstances.
- I agree to any award being used to settle any outstanding debts (with the exception of tuition fees) owed by me to either the University or a third party. (Delete this statement if you wish to opt out)

Your name (CAPITALS)

Your signature

Date

Please return your completed and signed form, with photocopies of all necessary documents, to the Student Funding Service, c/o The Base, A-Floor, University House. (next to reception) It will be checked and if complete your application will be accepted.