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| **OU Students Educational Trust Application for Charitable Funding** |

**CONFIDENTIAL**

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| Please complete this form if you are interested in making an application to the Open University Students Educational Trust (OUSET). We will usually communicate with you about your application via email. Please read the following information before completing the form:**OUSET Eligibility Criteria and Guidance Notes for making an application to OUSET can be found at:** [www.oustudents.com/ouset](http://www.oustudents.com/ouset)Applications will not usually be considered unless made within the specified application window, details can be found at [www.oustudents.com/ouset](http://www.oustudents.com/ouset). **Please take note of the following** **information before making an application:*** We will confirm receipt via email once the application has been received.
* Applications can take between 4 and 6 weeks.
* The timescales quoted are based on all information being correctly supplied to OUSET in the first instance.
* Any missing information will result in a delay of the processing of your application, or the application could be rejected and returned to you.
* The Open University have strict registration deadlines.
* Any delaying in providing OUSET with information or documents could result in missing the final enrolment date of your module.

If you have any questions regarding this form or if you require additional information about the application process. Please contact ouset@open.ac.uk  |

If you have previously applied to OUSET; please provide the following information. This information will be matched with our database:

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| On how many occasions? |       |
| Please provide the case reference number/s |       |
| Was your application/s successful/Did you take up the funding?  |       |

1. **PERSONAL DETAILS**

|  |  |
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| Surname |       |
| First Name(s) |       |
| OU Personal Identifier |       |
| Address & Postcode |       |
| Phone (Day) |       |
| Phone (Evening) |       |
| Email Address (please provide your email address used for communication with the Open University) |       |

1. **STUDY DETAILS**

Details of the module(s) this application relates to:

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| Module Code:  |       |
| Module Title:  |       |
| Number of Credits: |       |
| Start Date:  |       |
| End Date:  |       |

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| Module Code:  |       |
| Module Title:  |       |
| Number of Credits: |       |
| Start Date:  |       |
| End Date:  |       |

Details of the qualification you are working towards:

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| Qualification Code: |       |
| Qualification Title: |       |
| Number of Credits Completed:  |       |

Please give details of any completed academic qualifications. If you are applying for assistance with postgraduate study, this must include your most recent undergraduate degree:

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| Qualification Obtained: |       |
| Date of Award: |       |
| Awarding Institution:  |       |

1. **DETAILS OF REQUEST FOR FINANCIAL ASSISTANCE**

Please specify the assistance you are applying for:

|  |  |  |
| --- | --- | --- |
| Category of Grant Request | Details | Cost (£) |
| 1. Module fees
 |       |       |
| 1. Travel costs
 | Event:      Date:      Location:      Transport:       |       |
| 1. Other financial assistance (e.g. set books, equipment)
 |       |       |

You must have contacted and followed the financial advice given by the OU Student Recruitment and Fees (SRF) before applying to OUSET. Failure to do so could result in a delay, or the rejection of your application.

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| Date you contacted the OU Student Recruitment and Fees to enquire about the funding options available to you? |       |
| Please list the funding options recommended to you and the outcome of your enquiries with these funding sources.  |       |
| If you have not approached one, or more, of the funding options suggested by Student Recruitment and Fees; please state the reason why.  |       |

Please give details as to why you are not eligible for a Student Loan, or any other national funding source, funding available through the OU (such as Students Hardship Fund) which would also include Bursaries or any other support fund available to you at the time of making an application to OUSET.

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1. **STATEMENT IN SUPPORT OF APPLICATION**

It will help the Trustees considering your application if you can give us more information or details of special circumstances that have led you to apply to OUSET for financial assistance. Please comment on:

- The reason you are applying
- Your study success so far
- Study aims
- Financial situation that has led you to apply

Please complete on a separate sheet if necessary.

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1. **FINANCIAL DISCLOSURE**

Your application will not be considered without the following supporting evidence. Please tick to confirm you have included the following:

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| * Bank statements for past three months for each current or savings account in your sole or joint name
 | [ ]  |
| * If applicable: Bank statement for past three months for each current or savings accounts in the name of any other person who lives in the same household as the applicant.
 | [ ]  |
| * Documented proof of any outgoings (e.g. utility bills, mortgage/rent payments) or income (i.e. benefits, salaries) that are not included in your bank statements.
 | [ ]  |
| * Translations or full annotations of all documents provided where the original is not written in the English language
 | [ ]  |

Please confirm the following details:

|  |  |
| --- | --- |
| Are you: | Employed full time [ ] Employed part time [ ] Self-employed [ ] Not in employment [ ] Retired [ ] Other, please specify       |
| Your occupation (if applicable) |       |
| How many children under the age of 18 live with you? Please provide their ages. |       |
| Do you have any financial dependents who do not live with you? Please provide details.  |       |
| If it is relevant to your application and if you are registered with the Open University as a disabled student, please state the nature of the disability |       |

Please give details of your net monthly income (after deductions of tax and National Insurance) and your monthly household expenditure. \*You should include details for a partner if you live together or are married (not including separated spouses).

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| **Income** | You (£) | Partner\* (£) | **Expenditure** | Household (£) |
| Wages or Salary |       |       | Rent |       |
| Child Benefit |       |       | Mortgage Payments |       |
| Income Support |       |       | Council Tax/ Rates /Other Local Tax |       |
| Tax Credits |       |       | Water |       |
| Job Seekers Allowance/other unemployment benefits |       |       | Electricity |       |
| Housing Benefit |       |       | Gas |       |
| Carer’s Allowance |       |       | Internet |       |
| Universal Credit |       |       | Telephone |       |
| Retirement Pension(s) |       |       | Television |       |
| Disability Pension |       |       | Child Care |       |
| Incapacity Benefit/ ESA |       |       | Food |       |
| Disability Living Allowance |       |       | Transport Costs |       |
| Rent from Lodger/Tenant |       |       | Insurance Payments |       |
| Investment Income |       |       | Loans & Credit Card Payments |       |
| Other Income (specify):        |        |       | Other Items (specify):       |       |
| **TOTAL** |       |       | **TOTAL** |       |

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| If you receive income from other people contributing to the household, please provide details, or indicate NONE. | Name/ relationship:      Net monthly income:       |
| Please detail any savings you have, or indicate NONE:  | Name of bank/ building society:      Amount of savings:       |

1. **CHECKLIST**

Before submitting this application to OUSET please tick the below boxes to confirm all information provided and additional documents requested have been attached to the application. Any missing details, or the failure to provide information could result in the delay or rejection of your OUSET application.

**General**

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| * Module, Qualification and all fees listed are correct
 | [ ]  |
| * Academic Summary attached (this can be downloaded from your Student Home page)
 | [ ]  |
| * Read and understood the OUSET eligibility criteria
 | [ ]  |
| * Confirm that you have read and understood the guidelines to making an OUSET application
 | [ ]  |
| * You have explored all alternative funding methods for your fees or equipment
 | [ ]  |

**Module**

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| * Have you confirmed with the Open University that this module choice is suitable for you?
 | [ ]  |
| * The study material will be presented in a format suitable for you
 | [ ]  |
| * You are reserved on the module(s)
 | [ ]  |

**Financial**

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| * You have attached bank statements for past three months for each current or savings account in your sole or joint name
 | [ ]  |
| * Any other relevant financial documents attached showing proof of outgoings
 | [ ]  |
| * Confirm that any financial documents not in English have been translated or annotated into English.
 | [ ]  |

1. **DATA PROTECTION**

Personal data that you share with us regarding your application will be processed in accordance with our policy and UK data protection legislation. We will process your data in our legitimate interest and as a not-for-profit organisation solely for the purpose of your application for support. You may object to such processing activities which are most likely undertaken with your reasonable expectations. We will not share identifying personal data with any third party without your consent. When your data is processed in such a way, we will ensure appropriate safeguards are provided to protect your fundamental rights and interests. You may exercise any of your rights as details in our policy and UK data protection legislation. Exercising such rights may affect our ability to support you.

1. **DECLARATION**

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| Please check that you have answered each question fully, continuing on an additional sheet if necessary. Make sure you have included the evidence requested in Sections 2 and 5, or your application may be returned to you as incomplete. |
| This application will not be considered without a Letter of Support from your Student Support Team or Faculty. We will contact the Open University on your behalf to obtain this. In addition, we may contact other agencies in connection with your application. Do you authorise OUSET to consult with The Open University, the DSA Office, Student Loans Company and OUSBA on matters relevant to this application? Yes [ ]  No [ ]  |
| I declare that to the best of my knowledge all the information entered on this form is correct and complete and reflects a true picture of my financial position. Signature of Applicant:      Name of Applicant:      Date:       |

Please note that submission by email will be regarded as a signature.

You can return your completed application to the OUSET Team at the OU Students Association office by email to ouset@open.ac.uk or by post to the OU Students Educational Trust, PO Box 397, Walton Hall, Milton Keynes, MK7 6BE.

Applications will not usually be considered unless made within the specified application window, details (for module fees only) can be found at [www.oustudents.com/ouset](http://www.oustudents.com/ouset) We will confirm receipt and it will usually take between 4 and 6 weeks to receive a decision from the Trustees. The timescales quoted are based on all information being correctly supplied to the OUSET office in the first instance. Any missing information will result in a delay of the processing of your application, or the application could be rejected and returned. The Open University has strict registration deadlines. Any delaying in providing information or documents could result in missing the final enrolment date of your module.

If you have any questions about completing this application, please contact the OUSET Team by email or on 01908 652026.

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| Please let us know how you heard about the OU Students Educational Trust: Previous applicant [ ]  OUSET Ambassador [ ] From another student [ ]  OU’s Student Recruitment and Fees [ ] OU Students Association website [ ]  OU Staff [ ] Other [ ] If other, please provide some brief details below:      |