



GUIDANCE NOTES

APPLICATION FOR DISCRETIONARY FUNDING (Scotland)

Update May 2011

This application form can only be used to apply for assistance for study costs from Discretionary Funds provided by the Scottish Government to the Open University. If you require advice on help with the cost of fees, please call the Enrolment & Fees team at the Open University in Scotland on 0131 226 3851.

What can I apply for?

Part-time Discretionary Funds are intended to help students who need extra financial support because they face genuine financial problems during their course. They can be used to help with:

- The costs of study, including personal computer or laptop, Internet access, set books and stationery.
- The costs of travel and childcare, where they are associated with studying, e.g attending tutorials, attending residential schools or exams.
- In exceptional cases, priority debts, mainly associated with utility costs, which may prevent students from continuing their study.

Support can be given directly to you or will be paid to a third party, in the case of priority debts

Hardship Funds cannot be used to pay off existing debt (e.g. credit cards, overdrafts etc.), except where this debt has been incurred as a result of study, and proof of this can be demonstrated.

As the fund is limited, there is no guarantee that your application will be successful, nor that we will meet all of the costs you may ask for. Particular consideration will be given to students who are:

- Lone parents
- In receipt of a fee waiver.
- Receiving state benefits

Who is eligible?

To qualify for support you must be living in Scotland and be:

- Studying part-time.

And

- Ordinarily resident in Scotland, and either
 - A British citizen
 - And national of the European economic area, who has utilised their right of residence
 - Settled in the UK within the meaning of the Immigration Act 1971

How we assess your application

You must demonstrate that the gap between your income and expenditure constitutes 'real need' and cannot be reduced to a manageable level through your own action or other sources of support. We will look at your continued levels of expenditure on non-essential items.

Assistance from the Discretionary Funds is for students who can demonstrate financial hardship which cannot be reduced by their own actions or assistance from other sources. When deciding whether we can make a payment from the Discretionary Funds, we will look at your income and what we consider to be reasonable expenditure on living and course-related costs and if you are making all. All applications are assessed individually. Discretionary Funds are not meant to be given as an automatic payment to cover course-related costs.

When can I apply for support?

You can apply for support after your course has started as Discretionary Funds are there to assist you if you experience financial problems whilst studying. We will consider applications for computer costs prior to the start of the course, although we cannot pay the funds until course start.

Because applications cannot be considered before course start date, you should not embark on a course of study if you are dependent upon receiving a payment from Discretionary Funds as your application may not be successful and funds are limited.

Students in receipt of Department of Work and Pensions benefits

If you are in receipt of DWP benefits, you are advised that payments from the Discretionary Funds may affect your benefit payments. In general, "one-off" payments from the hardship fund to cover course-related costs should not affect your benefits.

It is your responsibility to check with the DWP to determine any effect a payment from the Discretionary Fund will have on your benefits. Open University staff cannot advise you in this regard.

Data Protection Act 1998

The Open University is a data controller in terms of the 1998 legislation. The Open University in Scotland 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 electronics record keeping.

The data will not be passed to any other third party without your consent, except where the University is required to do so by law. Any formal enquiries concerning the use of data noted here should be addressed to the Data Protection Co-ordinator.

Completing the application form

- **Read the guidance notes before answering the questions within the application.**
- **Please complete the form by printing clearly in black ink and by ticking the appropriate boxes.**
- **If you need more space, please use a separate sheet and attach it to the form.**
- **Your application will not be considered if you do not answer all the appropriate sections and attach copies of the evidence required.**
- **If there is anything on the form that you are not sure about, please contact the Enrolment and Fees team on 0131 226 3851 for advice.**
- **While every effort is made to ensure accuracy, the information in this application may change in the light of altered regulations or policy, or because of financial or other constraints.**

SECTION 1

- 1.1** Please complete the course code, start month and title of any courses you are currently studying.
- 1.2** Only students who are actively participating on courses will be eligible for assistance. We normally expect that students who are participating are submitting assignments.
- 1.3** To be a 'home student', you must meet both conditions below:
- Ordinarily resident in Scotland, and either
 - A British citizen or
 - A national of the European economic area, who has utilised their right of residency or
 - Settled in the UK within the meaning of the Immigration Act 1971

SECTION 2

If you are studying 60 credit points at undergraduate level, you may be eligible for a Disabled Students' Allowance. DSAs are available to students with a disability to help with the extra costs needed to study.

- 2.1** If you have not applied for a DSA and you believe you have additional requirements, please contact the Disabilities and Additional Requirements team at the Open University in Scotland (tel 0131 226 3851).

SECTION 3

This section asks you to give details of your household.

- 3.1** Use this section to list all the adults (persons over the age of 18) who live in your household. Please continue on a separate sheet of paper if necessary.
- 3.2** You should give details of any children for whom you or your partner are financially responsible. Please continue on a separate sheet of paper if necessary.

SECTION 4

Assistance from the Discretionary Funds is for students who can demonstrate financial hardship which cannot be reduced by their own actions or assistance from other sources. Please complete this section in full in order that your application can be assessed.

For both income & expenditure evidence you can send us copies of three monthly bank statements (with the account number only removed) if they clearly show what the incomings and outgoings are.

4.1 This asks for details of your income. Please complete all relevant sections.

We require details of your monthly Net (after tax and National Insurance) income. As this figure needs to be monthly, any weekly amounts need to be multiplied by 52 and divided by 12.

You must enclose evidence for every type of income you have listed. **As we are unable to return originals, you should send photocopies.**

Income from benefits

If you receive a benefit which is means tested or is an earnings replacement benefit, you should provide details of any such benefit. These benefits include Income-based Jobseekers Allowance, Income Support, Housing Benefit, Council Tax Benefit, Contribution-based Jobseekers Allowance, Incapacity Benefit, Statutory Maternity pay, Maternity Allowance, Statutory Sick pay, Invalid Care Allowance, Retirement pension, Bereavement benefits, Widowed Mothers' Allowance, Widows Benefit.

If you receive a benefit which is one of the following non means-tested benefits, please include it on the form (but we don't count it as income): Disability Living Allowance, Industrial Injuries Benefit, Child Benefit, Guardians Allowance.

Evidence to be provided:

Your and/or your partner's employment income	Photocopy of your and/or your partner's most recent P60 if dated within three months or Photocopy of your and/or your partner's two most recent payslips or Photocopy of your and/or your partner's certified profit/loss account with balance sheet or letter from the accountant giving levels and personal drawings or Inland Revenue calculation.
Your and/or your partner's retirement or disability pension	Photocopy of proof of amount and how often paid
Your and/or your partner's benefits	Photocopy of letter from Benefits Agency confirming entitlement and amount. Please enclose all the pages of the letter.
Your and /or your partner's unearned investment income	Photocopy of statement or Letter from bank, building society or investment companies stating amount and frequency of investment income or interest

4.2 This asks you for details of your monthly expenditure.

A Composite Living Cost has been determined by the government to cover expenditure on basic costs including food, household utility bills, clothes, entertainment, TV licence, and home contents insurance. By doing this, we can ensure all applicants are treated fairly irrespective of their lifestyle. Different rates will be used depending on the household information you gave in Section 3. You do not, therefore, have to give us details of utility bills, monthly food bills, etc.

The amounts we use to calculate this composite living figure are provided by the Department of Work and Pensions.

You should give details and evidence of any variable costs such as rent, mortgage repayments, childcare costs as requested on the form. Please use the Other expenditure section to give details of other items such as long-term loans or other debts. Please do not include one-off payments. We are unlikely to include the costs of satellite TV packages or gym membership as necessary expenditure.

Evidence to be provided:

Rent/mortgage	Photocopy of statement from bank or building society detailing monthly payments or Photocopy of rent book or Letter from landlord providing details of amount of rent due
Council Tax	Photocopy of statement of Council Tax due
Childcare costs	Photocopy of invoice from childcare provider or Letter from childcare provider detailing childcare provided and costs
Other expenditure	Photocopies of any relevant evidence which confirms expenditure

4.3 If there is any other information you wish to add to support your case, please give details here.

SECTION 5

5.1 Please list the type of support you are requesting from the Discretionary Fund. This might include the following:

- Help with travel to tutorials or residential schools
- Assistance to purchase study materials including set books or stationery
- Childcare while attending tutorials
- Priority debts
- Computer/ internet related

Please give details of the amount you are requesting, and provide relevant evidence wherever possible, such as invoices, bills, etc. For example, if you are requesting help to travel to tutorials, you should enclose a copy of the relevant train or bus ticket, or if you are anticipating this expense, details of the journey and a breakdown of costs. Please note that we will normally expect students to travel by public transport. If you are requesting help with childcare, for example, we need the same evidence we asked for in Section 4.3.

SECTION 6

Please make sure you understand the declarations in this section.

6.1	Sign and date this section yourself.
6.2	Your husband, or wife or partner should sign and date this section.

CHECKLIST

Before you send off your form, please take time to check you have done the following:

- Written your Open University personal identifier on the first page of the form
- Completed all sections of the form
- Read carefully the guidance in Section 4 on Income and Expenditure and have provided the correct evidence to support your application. Please check this thoroughly as it is the main reason applications are returned.
- Ensured the declaration are signed and dated

Please return the completed form and your evidence to the Enrolment and Fees Team, The Open University in Scotland, 10 Drumsheugh Gardens, Edinburgh, EH3 7QJ.