



Application for Community-Supported Place 2022-2023

Parents'/Carers' Names:.....

Iona School is a registered charity and independent from the state. It receives no government or local authority support. Therefore all expenses and running costs have to be raised within the school community. Ideally, income from parental contributions should cover the school's financial needs but, in practice, the school will continue to rely on other sources of income such as donations and fund-raising.

Our intention is to find ways of making Steiner/Waldorf Education available to any family who sincerely wishes to join the school community. We aim to take into account the financial circumstances of your family but your needs as a family must be balanced with the needs of the school and this is the context in which financial decisions will be made. ***Above all, prospective parents need to be realistic about the length and level of financial commitment required.*** (a minimum monthly charge of £300 per a month will be applied to all applicants.)

Households with a total gross income of less than £33,000 per annum may apply for reduced fees. The income includes benefits. For this purpose, the year runs alongside the school year.

Any financial help you receive comes from other families' contributions and the school community's fund-raising efforts and, to ensure fairness, the school needs to establish with some accuracy the financial circumstances of families applying for reduced fees. ***The school fully appreciates the need for sensitivity in dealing with these issues and all information given in this application form will be treated as confidential and only used for the purposes of calculating your school fees. It will not be shared with anyone other than those representing the school in a formal financial capacity. It is vital that you include the income of yourself and your partner that is living with you. If you are a single parent, please ask for another form for them to fill in.***

The system can only work fairly if families applying to the fund are completely open about their financial circumstances. If you fail to complete the form or provide the supporting documentation within the timescale given, you may not receive a reduced fee. Where further information or clarification is needed a meeting may be arranged with the School Business Manager.

1) FAMILY DETAILS
Names of parents or carers:
Address
Postcode
Mobile Phone No.
Email address
Telephone No.

Please list below the children in your care

Name	Age	(class if at this school)	Current school/nursery (if not at this school)

Do any of the children who attend (or will be attending) this school have a second parent who lives apart from you?	YES	NO
If yes, please supply their contact details and ask for a form for their income.		
Name of parent:		
Address		
Postcode		
Mobile Phone No.	Telephone No.	
Email address		

2) HOUSING
If you are living in rented accommodation what is the current rent per year?

Do you own your own home? If you do own your own home then please give the information requested below.	YES	NO
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Estimate of present value	How much is the mortgage?	What is your monthly payment?	How much is your council tax per year?
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£	£	£	£
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Do you own other properties? If Yes, please give the following information for each: continue on a separate sheet if there are more than one.	YES	NO
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Estimate of present value	How much is the mortgage?	Rental income (if any)	Rental expenses
£	£	£	£

3) INCOME FROM EMPLOYMENT & SELF EMPLOYMENT all adults caring for the child on the form MUST submit their earnings or benefits

	Parent/carer 1	Parent/carer 2
How many hours a week on average are you in paid work?*	Hours	Hours
Are you employed, self employed or both?		
Please give your gross pay (before tax & other deductions) from employment for the past year (incl. payments for casual work)	£	£
Please give your gross pay (before tax & other deductions) from employment for the coming year (incl. payments for casual work)		
If you are self-employed or in business please give approximate figures for the last twelve months & attach a copy of your latest accounts		
Annual Turnover	£	£
Profit (before tax)	£	£
Please give the approximate annual value in money terms of any additional benefits or payments in kind you receive (e.g. a company car)	£	£

*If your ability to take paid work is limited (e.g. for health reasons or childcare) please give details:

4) OTHER FAMILY AND HOUSEHOLD INCOME PER ANNUM CARER/PARENT ONE	
Please give the amount of any income you receive from investments or savings on an annual basis	£
Please estimate the amount of income you receive from family or friends on an annual basis	£
Annual amount of any benefits you receive Housing Benefit:	£
	£
Council tax benefit:	£
	£
Child tax credit:	£
	£
Working person's (family's) tax credit:	£
	£
Disabled person's tax credit:	£
	£
Child benefit:	£
	£
Other benefits:	£
	£
Maintenance:	£
Please give the amount of any rental income you receive (e.g. lodgers, students, holiday lets, paying guests, investment property)	£
Please give the amount of any income you receive from sources not mentioned above	£
Do you have to pay other school fees children under your care? if so, lease state school and annual amounts	£
Does your family have any significant debts (apart from mortgage)? If so, please give the amount and the approximate annual interest on the loan. Please also say below what the debt is for (eg. student loan, car purchase).	
Debt:	£
Interest:	£
4) OTHER FAMILY AND HOUSEHOLD INCOME PER ANNUM CARER/PARENT TWO	
Please give the amount of any income you receive from investments or savings on an annual basis	£
Please estimate the amount of income you receive from family or friends on an annual basis	£
Annual amount of any benefits you receive Housing Benefit:	£
	£
Council tax benefit:	£
	£
Child tax credit:	£
	£
Working person's (family's) tax credit:	£
	£

Disabled person's tax credit:	£
Child benefit:	£
Other benefits:	£
Maintenance:	£
Please give the amount of any rental income you receive (e.g. lodgers, students, holiday lets, paying guests, investment property)	£
Please give the amount of any income you receive from sources not mentioned above	£
Do you have to pay other school fees children under your care? if so, lease state school and annual amounts	£
Please list any amount of savings or funds that will be used for necessary home improvements i.e. windows, heating, roof repairs, substantial damage, flood damage etc. Proof of this work being carried out and paid may be requested in the future. Should you be unable to provide these documents a fee may be charged for discounts received unnecessarily.	£
Does your family have any significant debts (apart from mortgage)? If so, please give the amount and the approximate annual interest on the loan. Please also say below what the debt is for (eg. student loan, car purchase).	
Debt:	£
Interest:	£

5) INVESTMENTS & POSSESSIONS

Please give the amount of any cash savings you have.	£
If you have other investments, such as stocks and shares, please give the approximate cash value	£

Do you own any other assets (apart from houses & business assets) that are worth more than £2,000 per item (eg. boats, caravans, etc)? If so please list them below with their approximate value.

Description	Approx. value:
1)	
2)	

If you own your own business please give proof of income through copy of profit & loss accounts. (A copy of your annual tax return will also be required)	Business Assets	Business Liabilities
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6) OTHER INFORMATION

Have you investigated any of the following ways of meeting the cost of your child/ren's fees?

- Additional or improved employment?
- Contributions from grandparents or other relatives?
- Loans or grants from other sources including educational grants?
- Releasing equity in your house?
- Gifts or expected inheritance?
- Taking in boarders?
- releasing savings

Please note: PAYMENT WILL BE BY STANDING ORDER ONLY by the 3rd of the Month

Please can you seriously consider ways in which you can help the school community and enter these in this box. **It is vital that you fill this section in as we cannot consider incomplete forms.**

We are only able to offer these reduced fee places due to volunteer fundraising. We always need parents to run fundraising events, help others with theses, offer time and goodwill. Even volunteering to paint/garden/ do DIY work is vital as this frees up capital that we can put back into the community supported place fund.

You MUST include the below documents or provide written reason why this is not applicable to you

- Your most recent P60
- Payslips covering the last 6 months, if employed
- Copies of personal/business/savings/Bank statements covering the last 6 months FROM BOTH PARENTS
- Copy of your latest accounts if self employed
- Copy of your most recent tax return
- Copy of your latest Tax Credits Award/child benefits/student loans/student finance towards childcare fees
- Copy of your housing benefit statement
- Copies of any other benefits awarded
- Copies of maintenance agreements
- Copies of financial statements for fees paid to other schools.

Incomplete forms and those without supporting all the above supporting evidence will be rejected and you will have to pay the full fee until the next submitting date (6 months)

Please send your completed form and supporting evidence to: Fiona Stuart, School Manager, at the school address

DATA PROTECTION

All data will be securely held by Iona School Association and will be treated confidentially and with sensitivity. The data collected in this form will only be used for the purpose of calculating your school fees and will not be disclosed to any external sources. The data will only be seen by those representing the school in a formal financial capacity. Both electronic and paper records will be deleted/shredded when your contract with Iona has ended or your need for reduced fees has ceased. In signing and returning this form, you are agreeing to the processing of your personal data as described above. Under the terms of the 1988 Data Protection Act you have the right to object to the use of your data for the above purposes.

7) Household Spending

Please can you provide details on your monthly out-going so we are able to assess your ability to pay toward CSP.

- Mortgage/rent.....
- Homeowners or renters insurance.....
- Property tax (if not already included in the mortgage payment).
- Auto insurance.
- Health insurance.
- Out-of-pocket medical costs.
- Life insurance.
- Electricity and natural gas.
- Water.
- Sanitation/garbage.
- Groceries, toiletries and other essentials.
- Car payment.
- Gasoline.
- Public transportation.
- Internet.
- Cell phone and/or landline.
- Student loan payments.
- Other minimum loan payments.....
- Child support or alimony payments.

<input type="checkbox"/> Child care. <input type="checkbox"/> Travel / Holidays..... <input type="checkbox"/> Insurance..... <input type="checkbox"/> Any other Household expense.....

Please sign below:

The above information represents a complete and accurate record of my/our financial situation. **I/we agree to notify the school of any significant changes as they occur.**

I understand the school will reject incomplete forms or forms without all the documentation, I will have to pay the full fee until the next processing date (approx every 6 months)

I/we accept that if a reduction in fees is granted on the basis of information that is not correct, the reduction will be withdrawn and the money reclaimed.

I/we acknowledge that any reduction in fees is for **one year** only.

I/we understand that if I/we need a further reduction, this cannot be backdated. We will only reassess if there is a significant drop in income.

I understand that if I/we default payment for more than three months, I will have my reduced fee place revoked and the full fees charged.

I/we also agree to tell the school immediately if my/our income increases by any amount and understand our fees will be re-assessed.

Signed.....Date.....	Signed.....Date.....
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