



Trinity Hospital

# Salisbury City Almshouse and Welfare Charities

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## GUIDANCE ON THE COMPLETION OF EDUCATIONAL GRANT APPLICATIONS

Salisbury City Almshouse Educational and Apprenticing Charity is a small fund which can make grants to young people (up to 25 years old) who are resident in the Salisbury area and in need of financial assistance towards an educational activity. Priority is always given to individuals where either they, or their parents/guardians, are in receipt of benefits and applicants who demonstrate significant financial need. 'Education' is considered in the broadest sense and can include activities such as school trips, play schemes, obtaining academic, trade and professional qualifications, as well as adventure training, expeditions to and teaching in third world countries. The development of independence and self-reliance, initiative and resourcefulness often forms an important part of educational activities.

### What can be funded?

- a. As well as courses and trips, funds can be granted towards course fees, essential books, specialised equipment and tools required to undertake a course or trip etc. Regular payments towards fees or expenses are only made in exceptional circumstances.
- b. Grants are generally not paid until (where appropriate) we receive confirmation from the applicant's sponsor that the balance required has been raised in full.
- c. Postgraduate studies cannot be funded.
- d. Daily subsistence expenses (for example at university) are not funded.

## Completing the Application Form

### Part 1 - Personal Details

Please check the Personal Details section is completed correctly and in full. The applicant's NI number must be provided and the form signed by them.

### Part 2 - Reasons for Undertaking the Activity

Please explain in detail the reasons for undertaking this activity and the benefit you hope to gain for the future by doing so. This is of the utmost importance to the Trustees when considering applications.

### Part 3 - Sponsor's Recommendation

The sponsor could be a teacher, tutor or activity organiser and must have sufficient knowledge of your capabilities and background to assess if you will benefit from taking part. Please ask your sponsor to specify how he/she considers you will gain by taking part in the activity.

### Part 4 - Funding

Please list each element of cost and how the total amount of the activity will be funded. It is important that all other grants applied for are detailed by organisation and the amount requested from each. For applicants who are not self-supporting or financially independent, the Income and Expenditure form should be completed in full detailing 'household' income.

### Part 5 - Family Details

Please list the other members of the applicant's household.

## **Part 6 - Financial Details**

We need to have the fullest possible information about the applicant's parental/household's finances, weekly income and expenditure since our resources are limited and we would like to ensure that priority is given to those most in need.

- a. This should be completed in full by the applicant or their parent/guardian in the presence of the sponsor if possible. Ensure the figures are correct and that the totals are accurate. Please state if an expense item is payable monthly or four-weekly rather than weekly. All benefits received must be itemised.
- b. Ensure the totals of weekly income and expenditure fully reflect the household's financial circumstances realistically and sensibly.
- c. If it appears that expenditure exceeds income, this should be noted in Part 3 with an explanation of what is being done to correct this.
- d. If it appears that income easily covers expenditure, please explain in Part 3 why they are in need of a grant.
- e. Debts should be itemised to show:
  - The original amount borrowed
  - From whom it was borrowed
  - What it was for/why it was borrowed
  - The amount outstanding
  - The weekly repayments

## **General**

The Trustees meet to consider all applications on a monthly basis. However, if an application requires further clarification, is in an unacceptable form, illegible, or is considered to be of a low priority we will contact the sponsor prior to consideration. All Grants from the Charities are discretionary and subject to level of funds available. There is no automatic entitlement to a grant and all cases are assessed on an individual basis. The Trustees' decision is final. No correspondence will be entered into with unsuccessful applicants.

By signing the form, the applicant confirms that the information provided is complete and correct and that further information will be provided if requested. By signing the form, the sponsor confirms that, to the best of their knowledge, all the information provided is true and accurate, and that they are responsible for ensuring that the grant monies will only be used for the intended purpose.

## **Data Protection**

The application and any further information provided will be kept in our filing system (in paper and/or electronic form). Details of applications and any subsequent information will be recorded on our computer system, together with details of any subsequent correspondence and/or grants awarded. We may disclose personal information as necessary to third parties who supply goods or services to applicants as part of the grant making process or similar. We may also disclose information to third parties where necessary to comply with applicable laws and regulations and/or for the purposes of obtaining professional advice (e.g. legal advice).

**SALISBURY CITY ALMSHOUSE AND WELFARE CHARITIES**  
**APPLICATION FOR AN EDUCATIONAL GRANT**

*The Guidance Notes **must be read** prior to completing this form. Please use **BLOCK CAPITALS***  
*Post to: Salisbury City Almshouse and Welfare Charities, Trinity Hospital, Trinity Street, Salisbury SP1 2BD*  
*Email to: [clerk@salisburyalmshouses.co.uk](mailto:clerk@salisburyalmshouses.co.uk) (the form must be signed and all sections completed)*

**PART 1 - APPLICATION**

Full name of Applicant ..... Date of Birth .....

Applicant's address .....

..... Post Code .....

Telephone Number .....

Present Educational/Trade Qualifications .....

.....

Name and Address of School / College / or Employer .....

.....

Grant is required for .....

Applicant's Signature (if over 16) ..... Date .....

<p><u>For Office Use Only</u></p> <p>Received :</p> <p>Previous Correspondence attached:</p> <p>Grants Card Attached YES/NO</p> <p>Grants Committee Recommendation:</p> <p>Grant Approved</p> <p>Date Paid:</p>
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**PART 2 - REASONS FOR UNDERTAKING THE ACTIVITY / REQUIRING FINANCIAL ASSISTANCE**

Please enclose details of why you/the Applicant wishes to undertake this activity or requires the items, how they will benefit from the experience and how it will help with future plans. You should attach any supporting literature concerning the activity / course / expedition / etc which clearly shows the costs involved and the organisation providing the activity.

Total cost £ ..... Grant Requested £..... and/or Loan required £.....

If a dependant, do your parents/guardians approve of you taking part in this activity? YES ☐ NO ☐ N/A ☐

**PART 3 - SPONSOR'S JUSTIFICATION, RECOMMENDATION & AUTHORISATION**

Please attach a letter from your sponsor on their organisation's headed paper, which provides relevant background history on your situation, the reasons why you are experiencing difficulties and why financial assistance is needed. The sponsor should also explain how the quality of the applicant's life would be significantly improved if a grant were to be provided.

Sponsor's recommendations for grant : £..... and/or loan: £.....

Date: ..... Signature of Sponsor: ..... Name: .....

Organisation Name & Address: .....

..... Telephone Number: .....

To whom grant cheque payable: .....

(This cannot be an individual)

## PART 4 - FUNDING

Please itemise the costs of the Trip / Course / Apprenticeship / Equipment / Tools / Text Books / Expedition / etc.  
(Enclose copies of supporting information and documentation where appropriate or continue on Page 4 if necessary)

.....	£	.
.....	£	.
.....	£	.
.....	£	.
	<hr/>	
<b>TOTAL</b>	£	.
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### Amounts (if any) to be contributed towards the costs by:

Parent(s) / Guardian(s)	£	.
Applicant out of income or savings	£	.
Applicant from fund-raising activities, eg, part-time work, sponsored events, etc (Please give details of what you will be doing to raise money)	£	.

Details of other grants applied for:		Confirmed ?	
.....	£	.	Y / N
.....	£	.	Y / N
.....	£	.	Y / N

Details of other sources of funding:		
.....	£	.
.....	£	.
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<b>Total (equals the total cost of the course/trip as above)</b>	£	.
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## PART 5 - FAMILY DETAILS

Parent 1 Name .....	Occupation .....	DoB .....
Parent 2 Name .....	Occupation .....	DoB .....
Siblings:	1. ....	DoB .....
(& dependants living at home)	2. ....	DoB .....
	3. ....	DoB .....
	4. ....	DoB .....

# **PART 6 - INCOME AND EXPENDITURE, SAVINGS & OUTSTANDING DEBTS/ARREARS/FINES**

## **HOUSEHOLD INCOME (per week)**

Wages/Salary	£ .	per week
State Retirement Pension	£ .	per week
Pension from previous employment	£ .	per week
Benefits: Universal Credit	£ .	per week
Job Seekers Allowance (JSA)	£ .	per week
Employment Support Allowance (ESA)	£ .	per week
Income Support	£ .	per week
Working Tax Credits	£ .	per week
Child Tax Credits	£ .	per week
Child Benefit	£ .	per week
Disability Living Allowance/PIP Payments	£ .	per week
Attendance Allowance	£ .	per week
Carer's Allowance	£ .	per week
Incapacity Benefit	£ .	per week
Child Maintenance Payments	£ .	per week

Please give details of any other income and/or benefits received:

- £ . per week
- £ . per week

**Total Weekly Income:** £ . per week

Total Amount in Savings (Building Societies, Bank, Post Office etc)

£ .

## **HOUSEHOLD EXPENDITURE** (per week)

Rent / Mortgage (delete as appropriate)	£ .	per week
Council Tax	£ .	per week
Water Rates	£ .	per week
Energy costs (Gas, Electricity, Oil, Coal etc)	£ .	per week
Food and Household Expenses (incl pet costs)	£ .	per week
Travel Costs: Car (include insurance, maintenance and fuel)	£ .	per week
Public Transport: To work/shopping/other	£ .	per week
To school	£ .	per week
TV (Does this include Sky or similar? YES/NO)	£ .	per week
Mobile Phones	£ .	per week
Home Phone (Does this include Broadband? YES/NO)	£ .	per week
Insurances: {Household	£ .	per week
{Life	£ .	per week
Hire Purchase (give details)	£ .	per week
Mail Order/Catalogues/Clubs (give details)	£ .	per week
Other Expenditure - give details:	£ .	per week
<b>Total Weekly Expenditure</b>	<b>£ .</b>	<b>per week</b>

## **Details of Debts/Arrears/Fines:**

Original Debt £	Owed To	Reason money borrowed	Balance £	Weekly Payment £

Please ensure that all parts have been completed in full, the form is signed and you have provided supporting information as required.

## **ADDITIONAL BACKGROUND / SUPPORTING INFORMATION**