



# Financial Support for Ordinands in Full-Time Training

Updated Guidelines Figures for the Academic Year 2017/18

June 2017, v2

A Reference Handbook for Dioceses and TElS.

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# Introduction

## An Overview of Key Changes

This handbook provides guidance on assessing financial support for ordinands following full time training courses in the 2017/18 academic year. Diocesan support is not provided for ordinands following regional part-time courses.

There are two significant policy changes relating to the assessment of financial support that will operate in 2017/18:

1. Firstly, when calculating expenditure, ordinands should be able to take into account both interest and capital repayment charges on mortgages upon receipt of written evidence. This applies to **all** ordinands regardless of the year their training began or their pathway choice.
2. Secondly, the arrangements are being fully extended to cover those following pathways previously known as context based or mixed mode courses, which are now classified as full time training, alongside residential pathways. For 2017/18, ordinands starting on such courses are entitled to full maintenance support. Ordinands on “context based” and “mixed mode” pathways continuing their training having started in earlier years will continue with their current parish support, plus 50% diocesan family maintenance.

Further details on both of these changes can be found in the appropriate sections of this handbook.

September 2017 sees the implementation of the Resourcing Ministerial Education (RME) changes to financing of Initial Ministerial Education. From September, ordinands entering training will have their tuition fees and various allowances funded by a Block Grant given to dioceses according to the number and age of the ordinands they sponsor, regardless of their pathway choice.

The funding for this continues to come from the Training for Ministry Budget, funded by contributions from all dioceses on an apportioned basis. Details of these arrangements can be found in *Resourcing Ministerial Education – A guide to the new financial arrangements* which was widely distributed to dioceses and TELs in April 2017.

Under the new RME arrangements, dioceses will now be responsible for paying a range of personal allowances and travel expenses directly to ordinands. Details of these arrangements are summarised in the *Financial Information for Recommended Candidates* booklet, which is given to candidates once recommended for training by their bishop. The impact of these arrangements on financial support is explained further in the income section of this handbook.

## Pooling of Financial Support

The general principle of sharing the diocesan costs of financial support across all dioceses on an apportioned basis is known as pooling. The pooling arrangement means that the costs incurred by dioceses in sponsoring candidates in full-time ordination training are fairly shared between all dioceses.

In the spring of each year dioceses are asked to provide an estimate of aggregate financial support provided during the current academic year. The total cost is apportioned between dioceses in accordance with the Archbishops' Council's budget and taken into account in assessing each diocese's contribution to the budget the following year. Dioceses also provide details of actual costs for the previous year. The difference between estimated and actual costs in that year are then also taken into account.

There are a few circumstances in which the pooling of maintenance costs is restricted. This includes:

1. Maintenance support for ordinands who will have completed their training at the age of 50 or over will not be included in pooling. These ordinands still receive tuition funding and related allowances from the RME Block Grant.
2. Single ordinands following full-time residential pathways will have their financial support capped at £1,575 in 2017/18. There is an effective cap on support for non-residential full-time students through the operation of the accommodation guidance.. (See page 10).
3. There will be a non-poolable charge of £3,000 for all full time ordinands beginning non-residential courses (previously known as context based or mixed mode) in September 2017. This is part of the transition arrangements to the new RME framework and will be phased out by end of the transition period in Autumn 2020. This non-poolable charge does not apply to context based or mixed mode ordinands who began their training before September 2017. Further details can be found in Section 6 of the *RME Reference Handbook*.

## Budget Forms

Diocesan financial support is based on the use of a budget form showing estimated income and expenditure for an ordinand. The diocese is then expected to provide sufficient maintenance support to bridge any shortfall between income and expenditure.

The budget forms that should be completed by married ordinands and single ordinands respectively can be found at Appendix A and Appendix B. You will see that the two forms are increasingly similar. Details on how to complete these are described in the following pages. When completed, the forms should be sent to the DDO.

Any enquiries about these guidelines should be addressed to the Grants Officer as below:

The Grants Officer  
Ministry Division of the Archbishops' Council  
Church House  
Great Smith Street,  
LONDON SW1P 3AZ

E-mail: [grants@churchofengland.org](mailto:grants@churchofengland.org)  
Tel: 020 7898 1396

# Support for Married Ordinands

## Budgeted Expenditure

For married ordinands, please complete the Budget Form for Ordinands at Appendix A.

Table 1 sets out the recommended expenditure figures which represent reasonable standard expenditure for a married ordinand and their family. If Child Benefit will be taken into account in the income side of the budget, the expenditure figures in the second column should be used.

Table 1: Recommended Expenditure Guidelines 2017/18

	Child Benefit not taken into account as income (£)	Child Benefit taken into account as income (£)
Couple	11,227	11,227
First child, aged under 11	622	1,698
First child, aged 11 & over	1,460	2,536
Further children, aged under 11	986	1,698
Further children, aged 11 & over	1,836	2,536

The basic guideline figure for expenditure for a couple with two children under eleven has increased by 2.4% to £14,622 per annum, in accordance with national statistics.

A detailed breakdown of the components of the expenditure is shown in Table 2 below:

Table 2: Sample Family Budget 2017/18

	Couple (£)	Child aged under 11 (£)	Couple + 2 children aged under 11 (£)
Essential items <sup>1</sup>			
Food	3,021	512	4,045
Clothing and footwear	1,207	331	1,869
Fuel, light, power	1,310	92	1,494
Personal costs	5,689	763	7,214
<b>Total (minus housing)</b>	<b>11,227</b>	<b>1,698</b>	<b>14,622</b>
Housing <sup>2</sup>	9,036	–	9,036
Council Tax (if applicable) <sup>3</sup>	1,128	–	1,128
<b>Total (including housing)</b>	<b>21,391</b>	<b>–</b>	<b>24,786</b>

<sup>1</sup> From "ONS Detailed Family Expenditure"

<sup>2</sup> Housing figures from HomeLet Rental Index

<sup>3</sup> Council Tax average per single dwelling from DCLG

## Accommodation Costs

Accommodation costs will consist of rent or mortgage costs. Mortgage costs should include both interest and capital repayment charges upon receipt of written evidence. Information (from the Colleges) about the level of rents of College-owned property and in the private sector is set out in Table 3.

Table 3: Rented Accommodation (Average costs 2017/18)

College	% of married students in college-owned accommodation	College-owned accommodation (rent plus water rates) (£)	Privately rented 2 bed (£)	Privately rented 3 bed (£)	Privately rented 4 bed (£)
<b>Cranmer</b>	50%	8,760 - 10,200	5,477	6,454	8,757
<b>Cuddesdon</b>	100%	*12,120 - 15,120 (inclusive of all charges)	11,232	13,584	16,488
<b>Mirfield</b>	100%	9,750	6,427	7,812	11,093
<b>Oak Hill</b>	51%	8,160 - 12,360	11,788	14,704	21,607
<b>Queen's</b>	17 - 25%	5,700 - 8,300	7,350	8,606	12,514
<b>Ridley Hall</b>	8 - 12%	9,800 - 15,000	13,200	16,200	19,200
<b>St Stephen's House</b>	100%	**10,392 - 14,832	11,232	13,584	16,488
<b>Trinity, Bristol</b>	70%	9,000 - 14,000	8,136	10,006	14,686
<b>Westcott House</b>	30%	9,840 - 11,460	13,200	16,200	19,200
<b>Wycliffe Hall</b>	50%	10,200 - 17,460	11,232	13,584	16,488

\* Include gas and electricity, which needs to be taken into account in the budget.

\*\* Includes water and electricity, which needs to be taken into account in the budget.

Accommodation costs (within the pooling arrangement) should not exceed the recommended limits shown in Table 4 below:

Table 4: Married Ordinands Accommodation Pooling Limits

TEI	Annual Accommodation Pooling Limit
Mirfield, Queen's College, Birmingham, St Hild, St Mellitus North West	£10,460
Cranmer Hall, Trinity Bristol	£11,295
Oak Hill, Ridley Hall, Westcott House, Wycliffe Hall, St Stephen's House, Cuddesdon	£13,550
St Mellitus London (for ordinands living in London)	£17,794

Where colleges charge a deposit for family accommodation, this should not be included in the diocese's expenditure in the pooling arrangement and therefore also not taken into account in relation to the recommended accommodation maximum limits.

Married ordinands' removal expenses to College are normally met by a Diocesan grant in addition to the first year's annual budget. These expenses are eligible for inclusion in the national pooling arrangement.

## Council Tax

Council Tax should be accounted for where relevant in the family budget. Students are exempt from the 'personal' element within Council Tax and typically the charge per household is reduced by 25% for a married student.

Dioceses should check for local variations where students may be completely exempt from council tax and complete the family budget accordingly.

## Life Assurance Scheme

All dioceses participate in the Life Assurance Scheme for married candidates. This is currently provided by MetLife and the scheme now also includes civil partnerships. The level of cover provided in the forthcoming academic year will be £96,290 per candidate with an additional £24,260 for each dependent child. Levels of cover have remained the same for the last two years. The premium in 2017/18 will be £85 per candidate.

Ministry Division will continue to provide MetLife at the beginning of each academic year with details of the numbers, ages, children and sponsoring dioceses of all married candidates in full-time training. The premiums are met initially by Ministry Division, then later reclaimed from the dioceses through pooling.

Where candidates in training wish to continue any previously-held insurance policy, the costs involved, over and above the level of the standard premium, should in these cases be met from the candidate's own resources. Dioceses are asked to notify the Ministry Division Grants Officer, before the beginning of the autumn term each year, of any married candidates who they do not wish to be included within the scheme. This information will then be relayed by the Ministry Division to MetLife and taken into account in its calculation of the premium.

Dioceses will be aware that the terms of reference of the scheme now include the option of providing cover for any married candidate, or lone parent or civil partner, to be ordained to a stipendiary title who is training on a Regional Course, for a period of 3 months before the date of ordination. In the autumn, dioceses will be e-mailed a form containing details of the diocese's married candidates who, according to the Ministry Division's records, are training on Courses and due to be ordained in 2018. DDOs are asked to return the form to the Ministry Division, indicating the candidates to be included in the scheme).

## Budgeted Income

### Personal Allowances

The income side of the budget should include the payments made to candidates from the RME Block Grant.

Table 5: Allowances from the RME Block Grant 2017/18 for ordinands on full-time courses

	£
Personal Allowance (Residential)	1,620
Personal Allowance (Non Residential)	1,176
Short Vacation Allowance (Residential)	456
Long Vacation Allowance (Residential)	515

A personal contribution towards these allowances will be required if the ordinand is in receipt of income from savings and investments in excess of £1,375. In that case the allowance is reduced by 60% of the excess over this figure.

Non-residential students do not receive short or long vacation allowances since these are effectively provided through a combination of their accommodation and living allowances.

### Other Income

Where a continuing context based ordinand receives financial support from the parish or diocese, this should be included in the budgeted income calculation.

College rebates will generally no longer be available to married students. Where made in individual cases the student will need to inform the diocese. The rebate should be taken into account as income in the budget. Please note that college maintenance fees should not be entered as income in the budget.

Dioceses may disregard £1,225 pa of any income from employment during the vacations.

### The TAP Grant

Ordinands may also receive a TAP grant according to Table 6 below. (Dioceses are asked to disregard any grants made from the TAP Special Hardship Fund).

Table 6: Family Maintenance from the Church Times TAP Fund (and equivalent grants) 2017/18

	If in receipt of LEA (government) Award with dependents allowance (£)	If no LEA (government) Award (£)
Single ordinands	355	355
If no children	355	355
One child	850	950
Two children	900	1,000
Three or more children	950	1,050

Any LEA (Local Education Authority) award including dependants allowances, childcare grants, adult dependants' grants, etc. should be taken into account by the Dioceses in assessing grants for ordinands.

TAP grants are only provided to ordinands where budgeted expenditure exceeds budgeted income. They thus serve to reduce the financial support that the diocese would otherwise provide.



## Income from charities and donations

The recommended level of disregard of income from charities and donations (other than the *Church Times TAP Fund* and equivalent family maintenance grants from the *Archbishops' Ordination Funds*) will remain the same at £525 for the 2017/18 academic year.

## Partner's Income

The ordinand's partner should make an estimate of anticipated net earnings (i.e. less Income Tax, National Insurance contributions and any necessary expenses involved with the employment) and then be asked to contribute 75% beyond the first £2,500 towards the budget. Where essential child care costs are faced, these have generally been taken as necessary expenses involved with the employment.

It is recommended that income from Child Tax Credit and Working Tax Credit should be subject to a separate disregard, also of £2,450.

Dioceses are reminded of the agreement reached by the House of Bishops concerning the availability of candidates' spouses for work: "It is expected that the spouses of married candidates in training without dependent children should continue to seek employment in so far as they are able to do so. If it is proposed that this expectation should be relaxed in any individual case, the diocesan bishop should be involved in the decision."

# Support for Lone Parents

## Calculating Expenditure and Income

The Ministry Division's Finance Panel has recommended the following guideline for use in cases where the diocese makes a family maintenance grant for the support of lone parents in full-time training. The level of reasonable standard expenditure should be calculated as the total of:

- a. Accommodation costs, up to the maximum levels given for married candidates;
- b. The normal recommended expenditure figure for children, as given for married candidates;
- c. One half of the normal recommended expenditure figure for a couple, as given for married candidates;
- d. Plus special allowance of £1,570

The income side of the budget should include in the assessment of income any maintenance payments made to the family, including state benefits. Where a lone parent faces significant child care costs, consideration might be given to the possible disregard of any Child Tax Credit and Working Tax Credit above £2,500 to contribute towards these costs. Dioceses are asked to contact the Grants Officer if making a grant assessment along these lines.

It's possible for cover to be provided for lone parents in training within the Life Assurance Scheme. Dioceses are asked to notify the Grants Officer of candidates in this category who are to be included.

# Support for Single Ordinands

## Budgeted Expenditure

For single ordinands, please complete the Budget Form for Ordinands at Appendix B.

### Accommodation Costs

During term time, the board and lodging costs of residential students are met through the accommodation allowance paid to the TEI by the diocese through the RME Block Grant.

Where an ordinand stays in college accommodation during the vacation, the expenditure budget should be adjusted accordingly. Existing figures from 2016/17 are shown in Table 7 below. We recommend you confirm particular 2017/18 rates with the appropriate TEI.

Table 7: College accommodation charges for single students during vacations 2016/17

TEI	Vacation Rates
Cranmer	£23.50 per night, room only. All year £1,080
Cuddesdon	£105 per week (applies to all vacations)
Mirfield	£14 per night
Oak Hill	£14 per night
Queen's	No charge
Ridley Hall	£14.75 per night (Sept–June) £23.00 per night (July-Aug)
St Stephen's House	£127 per week
Trinity	£15 per day; all year £1,100
Westcott House	Christmas = £14.75 per night; Easter = £14.75 per night; Summer = £19.25 per night
Wycliffe Hall	£100 per week

Single students following a full-time non-residential course will be able to claim for the costs of their accommodation as outlined below, according to the location of their TEI. The table below shows the pooling limit.

Table 8: Single Ordinand Accommodation Pooling Limits

TEI	Annual Accommodation Pooling Limit
St Mellitus London	£7,970
St Mellitus North West, St Hild	£6,470

### Personal Expenditure

Residential students may claim for food during vacations at £40.80 per week. Non-residential students may claim this amount throughout the year.

## Budgeted Income

The income guidelines for single ordinands are the same as those for married ordinands. (See pages 8 and 9). Obviously no allowance need be made for partner's income.

# State Benefits

Advice and information may be obtained from Social Security Offices or the Government website ([www.gov.uk](http://www.gov.uk)).

## Income Support and Jobseeker's Allowance

In general, students are not eligible to claim Income Support or Jobseeker's Allowance for themselves or their dependents. However, where a student:

- a. Has a partner who is also a student he/she can claim Income Support during the long vacation if available for work;
- b. Is a lone parent he/she may claim Income Support during the year if any of his/her children are under 16;
- c. Is disabled and qualifies for the Disability Premium he/she may claim Income Support during the year.

The long vacation allowance was introduced in order to compensate for students' general loss of eligibility for these benefits during the long vacation. Dioceses should ensure this sum is entered as income in the budgets of married candidates.

Candidates' partners who register for employment are still eligible to claim Income Support, and possibly additional Jobseeker's Allowance, throughout the year, although couples with savings over £16,000 are completely ineligible for Income Support (and there is a sliding scale of reductions in Income Support for those with savings over £6,000). It is recommended that partners do submit a claim where appropriate for, even if no benefit is paid, Class 3 National Insurance Contributions may be met.

## Child Tax Credit

Married students with children, under 16 or under 19 if still at school, should apply for this benefit. Unlike Child Benefit it is means tested and is paid by the Inland Revenue direct to "the person who is mainly responsible for caring for the children in the family". It is paid in addition to Child Benefit which is not means tested. Despite the name it does not require one partner to be working and paying tax.

Applicants may check their eligibility at [www.hmrc.gov.uk/taxcredits](http://www.hmrc.gov.uk/taxcredits) or [www.gov.uk/taxcredits](http://www.gov.uk/taxcredits).

Dioceses are asked to disregard the first £2,500 of income from child tax credit and working tax credit together, then take into account 75% beyond this threshold in the budget.

## Working Tax Credit

Working Tax Credits may be applicable where one partner works more than 24 hours per week and there are sizeable childcare costs to be met. But couples without children are able to apply.

The contact details for applications are the same as those for Child Tax Credit above.

## **Housing Benefit and Council Tax Reduction**

Although students are no longer able to apply for Housing Benefit to help with rent, the partners of students may still apply to their local council for Housing Benefit and also Council Tax Reduction. In this case, a couple's savings may not exceed £16,000 (sliding scale from £6,000) in order to be considered eligible. If the family live in accommodation rented from the college, then Housing Benefit may be paid for the summer vacation only. If the family live in privately-rented accommodation, then Housing Benefit may be paid for the whole year.

## **Child Benefit**

Child Benefit is available to all members of the population with children aged under 16 (or under 19 if still at school) and income below £50,000 per annum. The current level of benefit is £20.70 per week (unchanged from 2016/17) for the first child and £13.70 per week for each subsequent child.

## **Free NHS Prescription, dental and optical treatment**

Income Support, Jobseeker's Allowance and Working Tax Credit all carry the right to free NHS prescriptions and NHS dental and optical treatment, but it is recommended that candidates apply for reduction of charges (form HCI) whether in receipt of state benefits or not. There is a health cost advice line. Tel 0845 850 1166.

## Appendix A

### Family Budget Form for Ordinands in Full-Time Training

Academic year	_____
Name	_____
Address at College	_____ _____ _____
Telephone no.	_____
E-mail address	_____
Theological College	_____
Director of Ordinands	_____
Home address and tel. no. (if you have not yet moved to College):	_____ _____
Ordinand's signature	_____

*(After completion sign this as your declaration of income and expenditure - **please ensure all sections of the form are completed**, putting 'nil' where applicable, and send it to your DDO)*

**Please let the diocese know if there are any changes in income during the period to 31<sup>st</sup> August (up or down) to the income details given in the form.**

Child Benefit is not included on the Income side, but child allowances on the Expenditure side takes account of this.

In connection with the Council Tax please note that all students are exempt from the 'personal' element within the tax so that, typically, the charge for the household of a married student will be reduced by 25%. A number of local authorities do, however, give the household complete exemption from Council Tax where the student and family live in College-owned or College-managed accommodation. Please ascertain if Council Tax will be payable and, if so, enter the amount on the expenditure side of the form. If you are uncertain, this can be met separately by the Diocese at a later stage when the actual level of charge is known.

Central life assurance cover is provided by MetLife through the Life Assurance Scheme for married candidates, but ordinands may opt out if they wish to continue with a current policy.

## Expenditure for academic year 2017/18

(excluding placements, and travel to/from TEI)

**Is this for 10 months (final year) or for 12 months?**

The academic year is taken to start on 1st Sept.

			£		£
Family Expenditure <sup>1</sup>	Couple		_____		
		Date of birth	_____		
	Children <sup>2</sup>	...../...../.....	_____		
		...../...../.....	_____		
		...../...../.....	_____		
		...../...../.....	_____		
		...../...../.....	_____		
		...../...../.....	_____		
<b>Total family expenditure</b>					_____
<b>Accommodation and Council Tax</b>					
Rent <sup>3</sup>			_____		
Water rates <sup>3</sup>			_____		
Council Tax (if applicable)			_____		
<b>Total accommodation expenditure</b>					_____
Life insurance <sup>4</sup>					_____
<b>Total expenditure</b>					_____

		10 months (£)	12 months (£)
<sup>1</sup> Couple		9,356	11,227
<sup>2</sup> First child:	under 11	518	622
	over 11	1,217	1,460
Further children:	under 11	822	986
	over 11	1,530	1,836

<sup>3</sup> If you are living in your own property please leave the rent and water rate sections blank and complete the Property Declaration form.

<sup>4</sup> Life Insurance is provided by the Diocese and the Ministry Division through the Life Assurance Scheme for married candidates, giving cover of £96,290 for ordinands (not spouses) and £24,260 for each child. If you wish to opt out of this scheme in order to continue with a current life insurance policy you may claim up to £85 towards your premium.



## State Benefits

### Income Support and Jobseeker's Allowance

Students in general are no longer eligible to claim Income Support and Jobseeker's Allowance on their own behalf or on behalf of dependents. There are, however, a small number of exceptions:

- i. where the student's partner is also a student, Income Support can be claimed during the long vacation if the claimant is available for work;
- ii. a student who is a lone parent may claim Income Support during the year if responsible for any children aged under 16;
- iii. a student who is disabled and qualifies for the Disability Premium may claim Income Support during the year.

To compensate for students' loss of eligibility for these benefits during the long vacation a standard grant of £515 will be paid by the Ministry Division to each student going on to a further year of study in the 2018/19 academic year. Candidates' partners who register for employment are still eligible to claim Income Support, and possibly additional Jobseeker's Allowance throughout the year, although in order to be eligible for Income Support a couple's savings should not exceed £16,000. It is recommended that partners do submit a claim where appropriate, for even if no benefit is paid Class 3 National Insurance Contributions may be met.

### Child Benefit

Child Benefit is available to all members of the population with children aged under 16 (or under 19 if still at school) and income below £50,000 pa. The level of benefit is now £20.70 per week for the first child and £13.70 per week for each subsequent child.

### Child Tax Credit and Working Tax Credit

Child Tax Credit was first introduced in April 2003. Married students with children (under 16 or under 19 if still at school) are eligible and should be expected to apply for this benefit. Unlike Child Benefit, it is means-tested, and paid (by the Inland Revenue) direct to "the person who is mainly responsible for caring for the children in the family". It is paid **in addition** to Child Benefit. Despite the name it does not require one partner to be working and paying tax. Applicants may check their eligibility online at [www.hmrc.gov.uk/taxcredits](http://www.hmrc.gov.uk/taxcredits) or [www.direct.gov.uk/taxcredits](http://www.direct.gov.uk/taxcredits). A claim pack should then be ordered through the Tax Credits helpline – 0345 300 3900. It has until recently been possible to apply online, but this facility is no longer available.

Working Tax Credit, also introduced in April 2003, replaces Working Families Tax Credit. This may be applicable where one partner works more than 24 hours a week (recently increased from 16 hours a week) and there are sizeable childcare costs to be met. But couples without children are eligible to apply. The contact details for applications are the same as those for Child Tax Credit above.

### Housing Benefit and Council Tax Reduction

Candidates are no longer able to apply for Housing Benefit with respect to rent but the partners of candidates may still apply to their local council for Housing Benefit and also Council Tax Benefit. To be eligible the couple's savings must not exceed £16,000. If you live in accommodation rented from the college, Housing Benefit may be paid only in respect of the Long Vacation. If you live in privately rented accommodation, Housing Benefit may be paid with respect to the whole year.

### Free NHS prescriptions, dental and optical treatment

Income Support, Jobseeker's Allowance and Working Tax Credit all carry the right to free NHS prescriptions and NHS dental and optical treatment, but it is recommended that all candidates and their families apply for reduction of charges whether in receipt of state benefits or not.



# Property income and expenditure declaration <sup>1</sup>

Name of ordinand: \_\_\_\_\_

Address of property: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Is the property let? YES/NO

What is the anticipated date of letting? \_\_\_\_\_

## Income (estimated)

	£	£
Rent for 10/12 months (at ..... per month)	_____	
Less depreciation at 10%	_____	
<b>Total Income</b>		_____

## Expenditure (estimated)

Anticipated tax <sup>2</sup> for the 10/12 month period if applicable		_____
Ground rent for the year if applicable		_____
Water rates (if payable by <u>owner</u> ) (at ..... per month) if applicable		_____
Service charge (at ..... per month) if applicable		_____
Agents fees for 10/12 months (at ..... per month) if applicable		_____
Mortgage payment for 10/12 months (at ..... per month) if applicable		_____
Mortgage Protection (not Endowment Policy) if applicable		_____
Building insurance for 10/12 months (at ..... per month)		_____
Contents insurance - <b>only if letting a furnished property</b> (at ..... per month)		_____
Gas check certificate/boiler maintenance for the year		_____
Any other items (please specify)		_____
_____		_____
_____		_____
<b>Total Expenditure</b>		_____
<b>NET INCOME:</b> <i>Income (as above), less Expenditure (as above)</i>		_____
<i>For information - Capital repayments (at ..... per month) if applicable</i>		_____
<i>For information - Endowment Policy cost (at ..... per month) if applicable</i>		_____

<sup>1</sup> This form is also for use by ordinands who are **living** in their own property.

<sup>2</sup> You may not yet know the anticipated tax on the income from your property. If it is not known please notify the diocese as soon as you have a figure.

### Notes

- If these figures change (up or down) please let the diocese know.
- If you have repairs to carry out on your property at some time during the year please let the diocese have details of the repairs and their costs as they **may** be deductible against the income on your property or, where ordinands are living in their own property, **may** be regarded as an additional budget item
- 10 month figures apply to those in their final year of training

## Appendix B

### Budget Form for Single Ordinands in Full-Time Training

Academic year \_\_\_\_\_

Name \_\_\_\_\_

Address at College \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Telephone no. \_\_\_\_\_

E-mail address \_\_\_\_\_

Theological College \_\_\_\_\_

Director of Ordinands \_\_\_\_\_

Home address and tel. no. (if you have  
not yet moved to College): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Ordinand's signature \_\_\_\_\_  
\_\_\_\_\_

*(After completion sign this as your declaration of income and expenditure - **please ensure all sections of the form are completed**, putting 'nil' where applicable, and send it to your DDO)*

**Please let the diocese know if there are any changes in income during the period to 31<sup>st</sup> August (up or down) to the income details given in the form.**

## Expenditure for academic year 2017/18

(excluding placements, and travel to/from TEI)

### 1. ACCOMMODATION COSTS (NON-RESIDENTIAL ONLY)

### 2. VACATION ACCOMMODATION

	Christmas Vacation (weeks) £	Easter Vacation (weeks) £	Long Vacation (weeks) £	TOTALS £
RENT of College accommodation (1)	£	£	£	£
RENT of other accommodation	£	£	£	£
or CONTRIBUTION to parents (if living at home)	£	£	£	£
FUEL, LIGHT & POWER (if not included in rent)	£	£	£	£
OWN PROPERTY (net expenditure)				£

### 3. PERSONAL EXPENDITURE

FOOD (2)	£	£	£	£
CLOTHING & FOOTWEAR				£
£603 (£503 if in final year)				£
PERSONAL COSTS				£
£3,585 (£2,987 if in final year) (3)				£
<b>TOTAL EXPENDITURE</b>				£

#### NOTES

- (1) For College accommodation charges for single students during vacations please contact your college.
- (2) A student will typically require approximately £40.80 per week with respect to food expenses. For residential ordinands this is only valid for vacations. For non-residential ordinands it is applicable the whole year. Where living with parents, it will need to be established whether any contribution towards food and other expenses will be expected by parents.
- (3) National Insurance Contributions are no longer included as a separate budget item as following the Pensions Act 2008 most students will choose not to pay NICs during training. The sum included under *Other Expenditure* has been increased accordingly.

## Income for academic year 2017/18

(excluding placement allowances, and travel allowance )

RME Block Grant	£		
Personal Allowance	£		
Short Vacation Allowance	£		
Long Vacation Allowance (1)	£		
		<b>TOTAL</b>	£
Context based support for continuing students	£		
LEA (government) student award (NB new students no longer eligible)	£		
EMPLOYMENT (less disregard)	£		
INTEREST from Savings and Investments (less any contribution to Ministry Division grants)	£		
PENSION	£		
OTHER GRANTS from Charities/donations from parish, family & friends (disregard first £525)	£		
PROPERTY INCOME (2)	£		
VACATION INCOME (disregard first £1,225)	£		
Any other income (3) (Please Specify) .....	£		
		<b>TOTAL</b>	£
<b>TOTAL INCOME</b>			£
<b>TOTAL EXPENDITURE LESS TOTAL INCOME</b>			£
(this is the balance payable to the ordinand)			£
Of which: TAP Grant (4)	£		
Leaving: Diocesan Grant	£		

**AUTHORISATION BY DDO/DIOCESAN OFFICER .....**

**NOTES**

- (1) The long vacation allowance should be included here only when students will enter a subsequent academic year of training.
- (2) Please leave this blank but if you or your spouse own property complete the attached form giving full details of income and expenditure
- (3) Allowances made by Colleges with respect to placement periods and the Ministry Division travel allowance, covering journeys to and from College, should not be included as income in the form.
- (4) The TAP grant will only be given where budget expenditure is expected to exceed budget income before taking any TAP grant into consideration.

# Property income and expenditure declaration <sup>1</sup>

Name of ordinand: \_\_\_\_\_

Address of property: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Is the property let? YES/NO

What is the anticipated date of letting? \_\_\_\_\_

## Income (estimated)

	£	£
Rent for 10/12 months (at ..... per month)	_____	
Less depreciation at 10%	_____	
<b>Total Income</b>		_____

## Expenditure (estimated)

Anticipated tax <sup>2</sup> for the 10/12 month period if applicable		_____
Ground rent for the year if applicable		_____
Water rates (if payable by <u>owner</u> ) (at ..... per month) if applicable		_____
Service charge (at ..... per month) if applicable		_____
Agents fees for 10/12 months (at ..... per month) if applicable		_____
Mortgage payment for 10/12 months (at ..... per month) if applicable		_____
Mortgage Protection (not Endowment Policy) if applicable		_____
Building insurance for 10/12 months (at ..... per month)		_____
Contents insurance - <b>only if letting a furnished property</b> (at ..... per month)		_____
Gas check certificate/boiler maintenance for the year		_____
Any other items (please specify)		_____
_____		_____
_____		_____
<b>Total Expenditure</b>		_____
<b>NET INCOME:</b> <i>Income (as above), less Expenditure (as above)</i>		_____
<i>For information - Capital repayments (at ..... per month) if applicable</i>		_____
<i>For information - Endowment Policy cost (at ..... per month) if applicable</i>		_____

<sup>1</sup> This form is also for use by ordinands who are **living** in their own property.

<sup>2</sup> You may not yet know the anticipated tax on the income from your property. If it is not known please notify the diocese as soon as you have a figure.

### Notes

- If these figures change (up or down) please let the diocese know.
- If you have repairs to carry out on your property at some time during the year please let the diocese have details of the repairs and their costs as they **may** be deductible against the income on your property or, where ordinands are living in their own property, **may** be regarded as an additional budget item
- 10 month figures apply to those in their final year of training