



UCL FINANCIAL ASSISTANCE FUND

GUIDANCE NOTES- POSTGRADUATE (DOCTORAL) RESEARCH STUDENTS

About this Document

This guidance about the UCL Financial Assistance Fund includes information on:

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The UCL Financial Assistance Fund for Postgraduate Research Students (FAF-PGR) consists of funds made available by UCL to support students who find themselves in unexpected financial difficulties, as well as funds generously provided by alumni, friends, donors and staff.. The fund is intended to act as a safety net for those in need, and can help alleviate unexpected financial hardship – although we are unlikely to be able to provide all the funds you may need, we aim to help eligible students as much as possible within available resources.

You can apply to the FAF by submitting the UCL Financial Assistance Fund application form and providing the requisite documentary evidence.

Please note the fund cannot be used to assist in the payment of tuition fees under any circumstances.

Eligibility

The UCL Financial Assistance Fund is for students currently enrolled on a UCL programme and paying fees to UCL. This includes students:

- Studying in any academic department
- On any year in their programme - excluding Completing Research Status (CRS) year*
- On any mode of study (full-time, part-time, or on a modular/flexible programme, distance learner)
- With any fee status (UK, EU or Overseas)

*Students on Completing Research Status (CRS) are not normally eligible but may be considered on a discretionary basis.

All students must be able to demonstrate that they have made reasonable and realistic provision at the start of their programme of study to fund both their tuition fees and living costs - – whether via partial



sponsorship, self-funding, or a combination of both – and that this has materially changed. All students who are eligible to apply for student financial support (e.g. loans) from their home Government must do so before applying to the FAF-PGR.

Applicants that have outstanding tuition fee debt to the university are not eligible to apply for the fund.

Priority students

UCL gives priority to the following groups of postgraduate research students when deciding how to allocate available funding:

- Those with children, especially single parents;
- Applicants with disabilities;
- Applicants who are self-payers (paying their own tuition fee and living costs without a full scholarship or loan)

Please note: applicants do not need to be in one of the above groups to make an application, but students in these groups are prioritized for support.

How much is available

Awards are for living costs only and will vary depending on individual circumstances and availability of funds. Maximum awards are currently as follows:

Student Category	Students without dependants	Students with dependants
Full-Time Students	£2,500	£3,000
Part-Time Students	£1,250	£1,500

When to apply

There is no deadline, but please note that funding is subject to availability and the Fund may close at short notice if the funds are exhausted. We therefore encourage you not to delay your application if you are in financial difficulty.

Making an application

PLEASE MAKE SURE YOU HAVE ALL YOUR SUPPORTING EVIDENCE READY BEFORE STARTING ON THE APPLICATION FORM.

Document Checklist



Please indicate which items you have submitted with your application form. If any evidence is missing or cannot be opened/viewed properly, your application cannot be accepted, as an assessment cannot be made.

Bank statements: You must supply copies of itemised bank statements covering the last three months, with the most recent being no more than two weeks old from the date you submit your application.

You must do this for all accounts held (e.g. Current Account, Savings Account, Credit Card account, NISA) relating to you.

These statements must show your name, bank account details and an itemised list of transactions. **Please annotate to explain any debits or credits over £200.**

We can accept official bank statements, screenshots of statements or online banking printouts. Statements printed on an Excel spreadsheet are not accepted.

Please note we reserve the right to request a current ATM mini statement / balance.

Additional documents

- *Evidence of income:* You must provide evidence of how you were intending to fund your programme of study/research e.g. Student Finance England award notification, scholarship/studentship/grant award letter, statement showing income from investments/savings, salary slips/statements dated within last 3 months.
(If you are in receipt of any benefits or tax credits evidence must also be provided)
- *Evidence of costs:* You must provide evidence showing your:
 - *Rent/mortgage costs for the entire academic year* – if you have resided in more than one location, please provide evidence of all tenancies. (Where you do not have a tenancy agreement you can provide a signed letter from your landlord/person who you pay rent to e.g. family member).
 - *Unexpected costs* – evidence and must be provided for all costs you would like us to consider, for example:
 - *Loss of salary* – if you are applying on the basis of loss of employment, please provide the following: evidence of loss of employment (e.g. P45), evidence you do not qualify for any compensation schemes (e.g. letter from employer);
- *Additional evidence (where relevant):*
 - If a parent/carer, copies of each child's birth certificate;



- If you have a disability, supporting evidence may be required if this is not already registered with UCL.

The Application Form

Section A: About You

Personal Details: The UCL student number is found on your UCL Student ID card

Term Time Address: All communications from our office will be to your UCL email account. However, it is useful for us to know where you live as this may need to be factored into our assessment process.

Programme Details: It is important that we know as much as possible about your degree programme in order to assess you correctly

Bank Accounts: We will assess these with reference to the supporting statements you have provided.

Tuition Fees: Please let us know how you are paying your Tuition Fees. Students who are not up to date with tuition fee payments will not be assessed for the Financial Assistance Fund.

Section B: Your Circumstances

Your Dependents: Complete this section if relevant. Provide details of any children and/or adults who are financially dependent on you.

Disability: Testing for Specific Learning Difficulties can be accessed through UCL's Student Disability Service. If you wish only to apply for assistance towards the cost of a diagnostic test, please contact the UCL Student Disability Service through [AskUCL](#) or, phone them on Tel: +44 (0)20 7679 0100. They will be able to provide a shorter dyslexia diagnostic-only application. UCL-FAF does not cover the cost of Dyslexia Diagnostic Testing. Please provide details of any disabilities or Specific Learning Difficulties here.

The Income/Expenditure Table (within the application form)

This table **MUST** be completed in your application form. Please take time and care to complete this as any mistakes or guesswork may lead to your application being incorrectly assessed or, it may cause a delay in the processing of your application while we contact you for the correct information.

You must enter certain items as annual figures (e.g. Student Loan), but for other items, e.g., your partner's contribution, you can choose to enter a weekly figure. Please only enter one figure per row.

You can enter your 'Expenditure' details as monthly or weekly figures. Please only enter one figure per row.



- We have separate boxes for income intended for tuition fees and living expenses. If you have savings for the full year, please separate what you intend to use for these two purposes, as this will help us assess your application quickly. This applies to scholarships and bank loans as well.
- SCHOLARSHIP / STUDENTSHIP / GRANT. Please note there are two separate boxes for tuition fee funds and living expenses funds. If your scholarship is intended for both tuition fees and living expenses, please separate these amounts according to your plan for the year, and use the different boxes.
- Postgraduate Loan (AMOUNT FOR MAINTENANCE ONLY): Please enter the amount of the loan that you are using for maintenance only and include a copy of your PGL confirmation letter showing the full loan amount.
- Savings (both for tuition and living expenses): Figures for savings must be the amount held at the start of the academic session – not any balance available at the time of application.
- Bank Loan (AMOUNT FOR MAINTENANCE ONLY): Please state the type of loan and indicate the full amount borrowed.
 - o Please use the separate box for loans borrowed for tuition fees.
- Parental / Family contribution including loans: Please indicate any contributions from your parents or family towards your studies, including any loans. Please keep parental contribution for tuition fees separate from parental contribution for living expenses. There are two separate boxes.
- Other Income: Enter any other additional income such as rental income, dividends, stocks, shares etc.
- Council Tax: Most students are exempt from paying Council Tax; however, if you provide a contribution towards it, please indicate the amount you personally pay and not the total amount.
- Travel Costs: In addition to weekly travel costs from your term-time address to UCL, please state total travel costs incurred for additional trips home due to family illness or bereavement (evidence will be required).
- Private Vehicle: Please note that car-running costs are not normally be considered for single applicants. However, for applicants who have children, or a mobility issue / disability, the cost of running a car may be included - although the full cost of this expense is unlikely to be covered.

Section C: Supporting Statements

This section consists of five parts; you will need to explain your circumstances in each part. All sections are to be completed.

You are advised to submit a supporting statement, succinctly explaining your reason(s) for applying. This should also explain any additional expenditure you feel is extending your financial difficulties.



Assessment / decision

We treat applications as 'standard' or 'non-standard' claims.

The assessment of Standard claims are under an 'additional need' methodology, which looks at the difference between accepted reasonable expenditure and expected income.

If you have experienced unexpected circumstances, your application could be considered under a 'non-standard' assessment process.

Both assessment types are undertaken using the same application form.

Standard Awards

These aim to assist in contributing to the general costs associated with being a student, such as rent, travel, food, books, field trips and childcare.

The level of assistance provided links to the assessment of need, by calculating annual income against annual expenditure using a combination of evidenced costs and notional costs.

It is expected that applicants apply for all statutory support to which they are entitled (including tax credits and benefits, where appropriate) before being eligible for consideration under this methodology.

A weekly Notional Postgraduate Income (NPI) will be applied to full-time postgraduate research students for standard assessments. NASMA have suggested the following figures for 2021-22:

Postgraduate students: £266.00 per week

Postgraduates with children, or who are unable to work: £213.00 per week

Actual net income will be used in the assessment of part-time students, including earnings, grants, savings, tax credits and benefits etc.

Non-standard awards

These aim to assist with meeting Exceptional Costs, such as repairs to essential household equipment, emergency situations (including travel costs for family illness or bereavement), any resulting hardship due to theft or fire, Priority Debts and expenditure not met fully through statutory grants (e.g. students with disabilities).



Evidence of these costs in the form of receipts or statements is required and would also include a copy of a Death Certificate, if for example, an applicant were seeking specific financial assistance as a result of a bereavement.

Part-time students

For part-time postgraduate research students who have not made realistic provision at the start of their programme to fund both tuition fees and living costs, an award from the FAF is not appropriate.

Composite Living Costs

There are predetermined expenditure levels, known as Composite Living Costs, for all students.

These are based on state benefit amounts for general living costs, such as food and usual household costs, such as utility bills.

The actual amount applied will depend upon your circumstances.

For 2021-22 Living-in-London rates, see below:

Single Student: £133.00 per week

Student living with spouse/partner: £181.00 per week

Single parent with 2 children under 16: £371.00 per week

Student with partner and 2 children under 16: £419.00 per week

Students with children, each additional child will see £103.00 per week added to the student rate.

Timetable for Making a Decision

Once your application and all evidence has been received, we will send an email informing you that a decision will be made within four working weeks. If more evidence is required, the four week waiting period will reset, so please do make sure you have submitted all required supporting evidence.

If we require more evidence, and email you with that request, you are asked to respond within one week. If we do not hear back from you within two weeks of the request, we will have to close your application.

Please be aware that should we receive your application without the following core pieces of supporting evidence, the decision turnaround time of four working weeks will not begin until you submit these documents:

- 3 most recent months of bank statements for all your accounts
- Proof of how you have planned to fund your course (through Student finance or any other funding organisation)
- Proof of any rent/mortgage you are paying



You will be informed of the outcome of your application by email (to your UCL email account). If successful, you should normally expect to receive payment within 10 days of the notification of your award.

Applying more than once in an academic year

You may only apply more than once during an academic year, **if your circumstances have changed materially or significantly from the time of your original application**. You must also not have already received the maximum award amount detailed above as the cap applies to the full academic year. You will need to provide all relevant evidence to demonstrate this change in your circumstances. All decisions are final and appeals cannot be considered.

Submit application and log bank details

Having read these Guidance Notes, please now complete your application form. If you have any questions, please contact the Student Funding Team in the UCL Student Funding Office.

Please submit your Application Form by [logging into AskUCL, select Log an Enquiry and choose Financial Assistance Fund \(FAF\) from the categories](#)

You must enter your bank details on Portico in advance of a possible award. To do so you will need to go to the “My Money” section and select the “View/update your bank details” option and enter them under the “Studentship Stipend” heading. Please ensure that a reference is entered; the reference is for your information only and is the wording that will appear on your bank statement when the award is paid in