

Bursary Scheme Criteria

Guidance for Parents/Applicants

Our charitable purpose is to reach as many families as possible and provide access to an outstanding education. We value diversity of all kinds in our schools and the benefits it brings to the learning environment.

This guide provides the criteria to be met for Bursary applications, in addition to the information that should be disclosed to the GDST when completing the online application form and a list of the documents that should be submitted with your application. The GDST must maintain uniform criteria for all applicants, this is essential to ensure fairness in the evaluation process. Consistency in applying these guidelines helps to create an equitable and transparent system, fostering trust and fairness.

Who can Apply

PARENTS/APPLICANTS

An application will be accepted from any of the following:

- 1.** All individuals with legal parental responsibility for the pupil are required to be part of any bursary application. This includes:
 - Completing the bursary application via the online platform
 - Providing full and accurate details of their financial circumstances
 - Supplying supporting documentation as requested

Furthermore, the GDST reserves the right to request financial information from any adult residing in the same household as the pupil, where their income or financial support may reasonably be considered part of the household's resources.

Failure to provide complete and accurate financial information from all relevant parties may result in the application being declined or closed.

In cases where a party with parental responsibility is unwilling or unable to participate, or where household financial information is incomplete, the school may not be able to proceed with the application unless exceptional circumstances apply. These will be considered on a case-by-case basis.

- 1.2 the child's guardian appointed under section 5 of the Children Act 1989 (or any earlier enactment) and the partner (if any) of that guardian where the partner normally resides with that parent and the child in the same household; or
- 1.3 the person with whom the child resides in accordance with either:
subsisting residence order made under section 8 of the Children Act 1989;
or

- 1.4 any subsisting court order (other than a residence order) that specifies who is to have actual custody or care and control of the child; or
- 1.5 where a child either has no parents as defined above or the GDST is satisfied that no such parents can be found, and she is either looked after by a local authority or provided with accommodation within the meaning of section 105 (1) of the Children Act 1989, the pupil shall be treated as one whose parents have no income for the purposes of the scheme; or
- 1.6 where none of the above applies, the parent is the person with whom the child normally resides in accordance with any informal care or fostering arrangement, and that person's partner (if any) where the partner normally resides with that person and the child in the same household.

2. Variation of the GDST's bursary criteria guidance

The GDST may make reasonable changes to this bursary criteria guidance on giving at least one Term's notice in writing.

3. Residency Requirements

At the point of application, both the applicant (pupil) and their parent/s must have been ordinarily resident in the UK for the three years leading up to the first day of term. Ordinarily resident means that you are living in the UK lawfully, voluntarily, and for settled purposes and have no time restriction on the length of time you can remain in the country. The main purpose for living in the UK during this period should not have been to receive a full-time education.

An application cannot be considered if you do not meet these requirements.

4. Armed forces personnel

For this guidance, 'UK Armed Forces' refers to active members of the British Royal Navy, Army, and Royal Air Force. Applications for support from service members or their families are processed based on where the applicant's (pupil's) family lived before enlisting. Where the applicant's family was ordinarily resident in the UK prior to enlisting, the pupil's application will be assessed unless the applicant or their family have established permanent residence elsewhere. Where an applicant's family have not established a permanent residence in the UK and is living overseas or in the UK on a posting, the applicant will not be eligible to complete a bursary application.

6. Financial Limitations

It is recognised that judgements about what sacrifices a family should make to pay school fees will be personal. However, GDST must ensure that all bursary grants are focused appropriately, therefore we will not consider an application if the applicant/s has:

- *Any additional property(ies) beyond the main residential home*
- *Savings in excess of £50,000*

- *Equity in any property in excess of £350,000*

It should be noted that this list is not exhaustive.

Opportunities to release capital, significant savings, and investments would be expected to be used for the payment of school fees, as would equity values in property assets.

7. The Application Process

When completing your application, please ensure that each section is completed, and all relevant supporting documents are uploaded. The GDST will not be in a position to proceed with an assessment if information is missing.

To be considered for a bursary once the application process is open for new bursary awards, our Financial Assistance Team will conduct a thorough online assessment of your family's income and assets.

You will be asked to provide evidence of British citizenship for all applicants (normally a British passport). If any family member is not a British citizen, we will ask for evidence that they have been granted indefinite leave to remain (*being in the process of applying for settlement at the time of the application/bursary assessment will not meet this requirement).

If you are eligible for a bursary, the amount of a bursary awarded will depend on several factors, including:

Your family's relevant income. This is usually calculated as the total income (before tax) from all sources for both parents. Family size is also a factor taken into account. If you have experienced any significant changes to your income during the current year, this will impact the bursary award for the next academic year. The assessment will also consider any financial support you are receiving, such as government benefits.

Your family's assets, including equity in property assets, cash at the bank, other types of investments, or any external payouts due during the year of the assessment.

We also require you to provide evidence of your income, such as a P60 or end-of-year accounts and Inland Revenue tax returns, or your set of financial accounts, whether you are employed, unemployed, self-employed, or retired.

You will be asked to list all dependent children who normally reside in the same household as the parent(s) (as defined above) and the pupil. The pupil for whom the application is made should not be included in this list. For each child, give their date of birth, the name of the school or college (if any) that each currently attends, and indicate whether it is a State, GDST, private (i.e. fee-paying) school, or university/college.

If a bursary is granted, this is a discretionary charitable donation from GDST, which is assessed annually. As a result, it may be adjusted, increased, or reduced or removed entirely if your financial profile changes year on year.

Note: For financial reviews in subsequent academic years - when parents separate but were, in the previous academic year, jointly liable for fees, both parents must continue to declare their income, except in discretionary cases agreed in advance by the GDST.

8. Confidentiality

All information is stored securely and processed confidentially per the General Data Protection Regulations.

The GDST respects the confidentiality of bursary awards made to families and recipients are expected to do likewise.

Guide to the financial information/documents required by GDST:

Section:	Documents to provide:
Earned income for each parent. This should include the gross amount of salaries and wages, before deductions for superannuation, pensions, AVCs, tax, and National Insurance, from all full- and part-time employment. Including any sums received as a bonus, commission, sick pay, maternity pay, etc.	<i>Form P60 (if completing the form after 5th April) and, in all cases, the latest two payslips (if paid monthly) or the last four payslips (if paid weekly). P45 if a change of employment.</i>
Profits from a business or profession - at the gross amount of income agreed by HMIT for the year in question (deductions should only be made for capital allowances).	<i>The latest Self- Assessment Tax Return (the current year for renewals) and the previous year will be acceptable, but we cannot accept any SATR older than 2 years. The latest business accounts and statement or letter from His Majesty's Inspector of Taxes (HMIT) confirming the taxable profit.</i>
Benefits in kind , e.g. free or subsidised housing, a company car, medical insurance, etc., should be included in the amount agreed for tax purposes.	<i>Form P11D, Notice of Tax Coding, or letter from employer giving the taxable amounts.</i>
Profit-related pay. You should include all such pay whether or not it is taxable.	<i>Letter from employer stating the full amounts.</i>
Pension received.	<i>Form P60 or latest payment advice.</i>
Child support or maintenance payments (received). Include: all payments you receive in respect of child support maintenance, voluntarily, by court order, or through the Child Support Agency (CSA).	<i>Appropriate evidence.</i>
Bank and Building Society Interest. The gross amount received, including the tax credit or amount of tax paid, must be declared.	<i>Interest certificates or bank statements showing the interest paid to you.</i>

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<p>Dividends and other investment income. The gross amount received including the tax credit or amount of tax paid, must be declared.</p>	<ul style="list-style-type: none"> • <i>The latest Self-assessment Tax Return (SATR) - (current year for renewals), and the previous year will be acceptable, but we cannot accept any SATR older than 2 years.</i> • <i>Appropriate evidence from the bank.</i> • <i>Please also be reminded that significant savings and investments would be expected to be used for the payment of school fees; therefore, a bursary application would not be considered in cases where substantial savings, investments, etc. are held.</i>
<p>Social Security Benefits. All benefits received, including Child Benefit, should be entered. If you receive more than one benefit, please use the "Add benefit" button to access additional rows.</p>	<p><i>The full 'Letter of Notification', or statement concerned showing the type of benefit and the amount you receive.</i></p>
<p>Any other income: also, in this section include any Redundancy Payment, 'Golden Handshake', Capital Gains, Student Grants.</p>	<p><i>Appropriate evidence. In line with HMRC guidelines, do not include the first £30,000 of redundancy. Please include any type of payment from family members.</i></p>
<p>Parent/Applicants' Assets</p>	
<p>If you rent your house, please select 'Rented' from the drop-down list</p>	<p><i>Your signed rent agreement/rent book and your current Council Tax bill.</i></p>
<p>If you own your house, select 'Owned' and enter the price paid, the current market value, and the amount of any outstanding mortgage, as well as the date of purchase. If you jointly own your house with a housing association, please enter the percentage of the property that you own. Space is provided in the comments box for you to provide details.</p>	<p><i>Your latest mortgage statement (should not be older than 12 months) and your current Council Tax bill. If jointly owned by a housing association or bank you will need to show evidence of the percentage owned.</i></p>
<p>Bank Accounts. Enter the account balance for all bank and building society accounts held by the applicants. This should include current and savings accounts, ISAs, and any inheritance funds received.</p>	<p><i>Bank statements spanning a 6-month period. Please also be reminded that significant savings and investments would be expected to be used for the payment of school fees; therefore, a bursary application would not be considered in cases where</i></p>

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	<i>substantial savings, investments, etc., are held.</i>
Investments in stocks and shares. Valued as near as possible to the date of the application should be shown. Shares in a company not listed on the stock exchange should be valued at the relevant proportion of the net company worth.	<i>A list of all holdings and values. Please also be reminded that significant savings and Investments would be expected to be used for the payment of school fees; therefore, a bursary application would not be considered in cases where substantial savings, investments, etc.. are held.</i>
List any other assets not given previously. Do not include the value of your family car or house contents unless any of those contents are separately listed for insurance purposes.	<i>Appropriate evidence.</i>
For self-employed parents, give the date on which your business accounts end and state when the latest accounts will be available i.e., for the last business year.	
Dependant Children's Income	
Give details of the source or type of income for each dependent child. You should not include income from part-time employment unless they are employed in the parents' business. You should include the gross interest or income from any bank or building society deposits or shares.	<i>Interest certificates or statements showing the interest paid, share dividend vouchers, and other appropriate evidence.</i>
Please state if there is a court order or other agreement that requires the payment of school fees. This should be given even if the order or agreement is not being complied with, but you should state this if it is the case.	<i>Provide full details of the order or agreement.</i>
Please give the amount that will be paid in the forthcoming school year from any insurance policy or other scheme for the payment of school fees including payments from family members.	<i>Please send the appropriate documentation.</i>

Please note:

- We reserve the right to request sight of your original documents in support of your bursary application and to make any other enquiries that the GDST deems necessary, including conducting credit checks. We may also request legal verification such as a sworn affidavit.
- Documents and any subsequent information/documents that are required to support your application must be submitted immediately upon request; failure to do so will result in the application being closed due to insufficient or missing information/documents.
- Please note that any offer of a bursary for entry to the school is discretionary and will be made by the school and *not* by the Financial Assistance Team.