

Elmfield Parent Fee Discount – Guidance 2021-2022

Elmfield School aims to make its education available to pupils from as diverse a range of background as is possible within the prevailing circumstances. As an independent school Elmfield receives no government funding and relies on the timely payment of fees by families. It therefore asks parents to view their financial commitment to the school as a priority.

Financial Limitations

- There is a finite budget for tuition fee assistance and there is no guarantee of any discount being given or being maintained at a level offered previously. The School reserves an absolute right of discretion.
- Tuition fee Discounts are offered on the basis of last resort. Applicants must consider all other possible sources of funding before applying to the School.
- Tuition fee discounts are not available for Parent and Child Group, Nursery, Kindergarten or for Boarding Pupils.
- The decision of the Finance Committee is final.

Tuition fee discounts for the 2021-22 academic year are subject to the following minimum charges per annum:

One Child	£4,725
Two Children	£5,850
Three Children	£7,775

Suitability

Each case is assessed on its own merits and awards are made within the context of the prevailing circumstances. It is recognised that judgements about what sacrifices a family should make to pay school fees will be personal; however, the school has a duty to ensure that all fee discounts offered are appropriate and so, as well as current earnings, other factors which will be considered in determining the award or level of any fee reduction include (but are not limited to):

- The ability to improve the financial position or earning power of each parent. For example, where there are two partners, both would be expected to be employed unless one is prevented from doing so through incapacity, the need to care for children under school age or other dependents, or the requirements of their partner's work. Families whose income is reduced as the result of a 'lifestyle choice' will not be eligible.
- Opportunities to release any capital. Significant capital savings and investments would be expected to be used for the payment of school fees, as would equity values in property assets.
- In cases of parents who are divorced or separated, the contribution that is being made or could be made by both parents, regardless of who the child lives with, and based on the principle that liability for the fees is joint and several. This means that the school may consider the financial circumstances of each parent separately and together, treating each parent's household separately.
- Contribution to household costs including school fees by other family members, any adults unrelated to the child or by third parties / outside sources.

Acknowledging that others might have a different view, the school considers that the following would not be consistent with the receipt of a fee reduction. It should be noted that the list is not comprehensive:

- families living more than 35 miles from the school
- investment in significant home improvements;
- regular or expensive holidays;
- new or luxury cars;
- a second property/land holdings;
- failure to honour current school fee payments (at this or any other fee paying school)

Information Requirements

To apply for a Parent Fee Discount for the 2021-22 academic year please complete fully Sections A-K of the form below and provide the requested supporting evidence. Please supply photocopies of any documentation you provide not originals. Documentation will not be returned.

In addition to the information requested in the form below you are also requested to submit bank statements for all of your bank accounts covering the period 1st Jan 2021 to 30th Mar 2021.

For the self-employed, please provide your most recent 2 years of accounts.

If your financial circumstances have changed significantly as a result of the Covid-19 pandemic, please also provide as much background information as you can in your supporting email/letter.

Please return this form to the School no later Tuesday 4th May 2021.

Other Sources of Fee Assistance

In addition to the Elmfield fee discounts, there are a number of educational and charitable trusts that provide assistance with tuition fees. In the majority of cases, these are to assist children who are already attending a fee-paying school and due to a change of circumstances may be unable to remain. Please refer to The Educational Trusts Forum at <https://educational-grants.org/about-etf/>

Confidentiality

The school respects the confidentiality of parents and recipients who have applied for fee discounts and prospective recipients are expected to do likewise.

Privacy Notice

The information you are providing is for the purpose of applying for fee assistance from the school and we have only asked for sufficient information to carry out the administration of this process. The details entered on this form will be reviewed by the School and will remain confidential, after which any supporting data is securely disposed of. You can at any time request access to the information held about you and, if necessary, correct the information if it is not accurate. If you have a concern about the way we are collecting or using your personal data, please raise your concern with the school Business Manager in the first instance. Our Data Protection Officer (DPO) is provided by SIPS Education Ltd. The named Data Protection Officers are Laura Hadley, Sue Courtney-Donovan and Amanda Moore, who can be contacted via SIPS Education at gdpr@sipseducation.co.uk You can also report a concern online to the Information Commissioners Office at <https://ico.org.uk/concerns>

SECTION A – PARENT AND PUPIL DETAILS

Full names of parent / guardian and partners who share the pupils' address	Relationship to pupils	Daytime phone no.	Email address

Full Name of each pupil applied for	Class in Sept 2021
Address	
Postcode	
Name of non-resident parent (if applicable)	Phone no.
Contact address of non-resident parent:	Email
Postcode	

Please also include any children in Nursery/Kindergarten in receipt of funding.

SECTION B INCOME FROM EMPLOYMENT

	Parent / Guardian 1	Parent / Guardian 2
Name		
Occupation		

	Parent / Guardian 1	Parent / Guardian 2	Documentation required	
Current annual gross income 2020/2021			Form P60	
Tax payable for 2020/2021				
National Insurance 2020/2021				

If you do not have your P60 please provide your March 2021 pay slip

SECTION C SELF-EMPLOYED INCOME

Complete this section if you are self-employed and do NOT own a limited company.

Nature of self-employed activity	
When did you start this activity?	
Names of any business partners	

Documentation required in all cases:

- ***Business accounts and a copy of your full tax return for the last two years to 5th April 2021***
- ***Management accounts for current year or personal current bank statements for period 6th April 2020 to 5th April 2021.***
- ***Any additional information if your income has changed substantially.***

Annual figures required	Parent / Guardian 1	Parent / Guardian 2	
Actual gross income			
Tax payable 2010/2021			
National Insurance payable 2020/2021			

SECTION D INCOME FROM YOUR OWN COMPANY OR LLP

Name of Company	Company No.	Date of Incorporation
Business Activity of Company		
Ownership Details, including shareholders, and their relationship to you.		

Documentation required in all cases:

- ***Copy of latest accounts filed with Companies House (full accounts) and management accounts for the period since then***
- ***The last two personal and corporate tax returns submitted***
- ***Estimated income for April 2020 – April 2021***

Annual figures required	Parent / Guardian 1	Parent / Guardian 2	
Salary drawn – last 2 years (P60 to 05/04/21) or March 2021 payslip			
Dividend income – last 2 years			
Tax payable, to 05/04/21			
National Insurance paid			

SECTION E WORK RELATED CHILDCARE COSTS

	Parent / Guardian 1	Parent / Guardian 2	Documentation Required	
Childcare costs incurred solely for the purposes of work			Receipts or invoices for 2020/2021	

SECTION F INCOME FROM STATE BENEFITS 6th April 2020 – 5th April 2021

Annual figures required	Parent / Guardian 1	Parent / Guardian 2	Documentation Required	
Child Benefit			Copy of award notice	
Child Tax Credit			Copy of award notice	
Working Tax Credit			Copy of award notice	
Housing Benefit			Copy of award notice	
Council Tax Benefit			Copy of award notice	
Income Support			Copy of award notice	
Job Seekers' Allowance			Copy of award notice	
Widow(er)'s Benefit			Copy of award notice	
Other Benefit			Copy of award notice	

SECTION G

OTHER INCOME

6th April 2020 – 5th April 2021

Annual figures required	Parent / Guardian 1	Parent / Guardian 2	Documentation Required	
Income from lodgers				
Any sum in aggregate received from friends or family including for payment of school fees				
Income from a former partner other than the parent of your child(ren)				
Any other income including investment, pension etc			Recent statement	
Details of other income				

SECTION H

DETAILS OF PUPILS' MAIN RESIDENCE

6th April 2020 – 5th April 2021

HOME OWNERS: complete this section if you own or part-own the property that you live in		Documentation required	
Market value of the property		Valuation if available	
Mortgage outstanding		Latest mortgage statement	
Mortgage capital payment for last 12 months			
Mortgage interest payment for last 12 months			
Annual Council Tax payable		Latest Council Tax Advice notice	
TENANTS: complete this section if you are a tenant in the property you live in.			
Current annual rent		Rental Agreement	
Annual Council tax payable		Latest Council Tax Advice Notice	

SECTION I SECOND AND SUBSEQUENT PROPERTIES

Complete this section if you own or part-own a property which is not your main residence. If you own two or more such properties, provide aggregate figures.

	Parent / Guardian 1	Parent / Guardian 2	Documentation required	
Market value of property	£		Valuation(s) if available	
Mortgage outstanding	£		Latest Statement(s)	
Mortgage capital payment for last 12 months				
Mortgage interest payment for last 12 months				
Gross annual rental income before tax			Accounts	
Address(es) of second or subsequent property / properties.				
If you part-own this property/properties please give details of the % owned, other owners and their relationship to you.				

SECTION J OTHER CAPITAL ASSETS

Declare all savings, investments or other capital assets in this section

	Parent / Guardian 1	Parent / Guardian 2	Documentation required	
Savings accounts	£	£	Latest statement	
Savings in bonds or similar	£	£	Latest statement	
Stock market investments	£	£	Latest valuation	
Other assets	£	£		

SECTION K MAINTENANCE INCOME

Complete this section if you are separated from your children's other parent.

Do you receive any of the following from your ex-partner?	Amount per year
A contribution to school fees	£
Maintenance income to cover living costs	£
Contribution in kind, please give details	
Please give details of contact with your ex-partner, indicating whether regularity of contact	
You	
Your child(ren)	
Are you satisfied that your ex-partner is making reasonable overall contribution to the costs you incur in relation to your child(ren)?	
If no, please outline the attempts you have made to enforce payment of maintenance:	
Please use this space for any further details that you feel would support your case.	

DECLARATION

Parent / Guardian 1	Parent / Guardian 2
<p>I declare that the information provided on this form is a complete and truthful statement of my income from all sources and of my assets of all kinds.</p> <p>I undertake to notify Elmfield School immediately should there be any material change to my financial circumstances.</p> <p>I agree that if any information provided by me is found to be false or incomplete, any and all fee discounts granted by the School will become immediately repayable as a debt.</p> <p>I agree to be jointly and severally liable for this undertaking with Parent / Guardian 2.</p>	<p>I declare that the information provided on this form is a complete and truthful statement of my income from all sources and of my assets of all kinds.</p> <p>I undertake to notify Elmfield School immediately should there be any material change to my financial circumstances.</p> <p>I agree that if any information provided by me is found to be false or incomplete, any and all fee discounts granted by the School will become immediately repayable as a debt.</p> <p>I agree to be jointly and severally liable for this undertaking with Parent / Guardian 1.</p>
Full name	Full name
Signature	Signature
Relationship to pupil	Relationship to pupil
Date	Date

Please return this form to the School no later Tuesday 4th May 2021.

Applications received after this date will not be processed and full fees will be charged for the 2021-22 academic year.