



MALVERN ST JAMES
Girls' School

FUNDRAISING FOR BURSARIES CASE FOR SUPPORT



FOUNDATIONS AND VISION



MALVERN ST JAMES
Girls' School

The women who set up our founding schools in the Nineteenth Century – Malvern Girls' College, St James's School, St James's & The Abbey, The Abbey and Lawnside – were the pioneering trailblazers of their era, committed to providing girls with a modern, forward-looking and holistic education that was on a par with the best that was available for boys.

They were all determined that women should be able to play a full and integral part in society and make a significant contribution to it.

Malvern St James has stayed firmly true to this original vision and ethos. As the Good Schools Guide says, "MSJ is full of girls who are going to change the world."

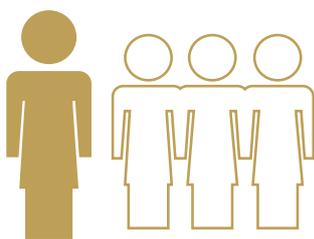
MALVERN ST JAMES TODAY

The academic tradition of our founding schools continues: we see girls taking up the most sought-after university courses and leading the way in a diverse range of careers. Our girls are individuals, but they are united in the pursuit of excellence in all things and the desire to achieve their personal best.

BURSARIES – A GIFT WITH LIFELONG IMPACT

It is part of our School mission that we should be able to attract the brightest and best pupils, regardless of their family circumstances. We want to be the school that any talented child can come to. This means giving greater bursary assistance to more pupils to open up the opportunity of an MSJ education.

Currently 1 in 4 pupils receives means-tested bursary assistance. The majority of these awards is capped at 40%, with the exception of the Founders' Award, which has an unlimited remission. The Founders' Award is currently only available in Sixth Form in order to keep costs manageable. With additional funding, we would like to extend these Awards across the Senior School.



The School already invests £0.5 million per annum in means-tested bursaries. To reach more girls will require further significant financial support and can only be realised with the generous help of donors. Between 2021 and 2025 the School aims to fundraise £2 million in gifts to deliver additional bursary provision.

100%

TRANSFORMATIONAL OPPORTUNITIES

We are asking you to consider giving to girls' futures. Your donations will help to create the transformational experiences that a first-class education provides. We rely on donors' generosity as in common with most girls' schools, we do not have any endowments to draw on.

Your contribution will allow us to raise more funds and help more girls, specifically:

- 100% funded Sixth Form Founders' Awards places
- 100% funded Senior School places
- Some 110% funded bursary places (ie full fees plus additional budget to spend on enrichment activities, trips, uniform, transport etc)
- Flexible bursary assistance across the whole school which goes further than the current 40% cap
- Funding of specialist bursaries, such as Music, Sport, Science, Drama

BENEFITS TO THE WHOLE COMMUNITY

The positive impact of bursaries reverberates not just on the life of the recipient, but on the whole MSJ community. Having a diverse and inclusive student body ensures a social, cultural and intellectual energy which brings more ideas and different perspectives, and benefits us all.

NAMING OPPORTUNITIES

There will be opportunities to name gifts in dedication to the individuals who have had great influence on the life of MSJ and its founding schools – Headmistresses, founders, exceptional teachers – thereby leaving a lasting legacy.

WHAT MY BURSARY HAS MEANT TO ME

“It is incredibly important for me that other girls are able to access this opportunity for outstanding education. As a bursary recipient, I truly believe I would not be the person I am today without having been provided with the opportunity to attend MSJ.”

Emily, 2021 Leaver

“I would really like the Founders’ Award to be available for more girls who want to be able to have the opportunity to try all the things on offer at MSJ and get stuck into a really diverse environment where not only is there academic excellence, but a lot of fun things to do and rewarding life experiences to be had.”

Lara, 2019 Leaver, reading Medicine at Cardiff

WHAT IS SPECIAL ABOUT AN MSJ EDUCATION?

“MSJ girls choose some of the most demanding courses at the best universities in the UK and the world, including Oxford and Cambridge and the Russell Group universities. Recent



bursary scholars have achieved places at Oxford to read Engineering, Cambridge to read Veterinary Medicine, Cardiff to read Medicine, Exeter to read English and Leeds to read Physics.

Girls achieve outstanding outcomes because they are encouraged to think in a way which is big and bold and to participate in a wealth of enrichment activities which foster independent thinking, creativity, leadership and confidence.

Classes at MSJ are small and lively. Girls are encouraged to express their opinions, to craft their arguments and to speak confidently in front of a supportive audience of peers, teachers and visiting academics and professionals.

Whether it is debating with the English Speaking Union or in Model United Nations; creating and running a business in Young Enterprise; or fundraising and delivering infrastructure projects for the Gambia charity initiative, girls have every opportunity to lead, innovate and show their passion to be agents of change in the wider world. ”

Mrs Olivera Raraty,
Headmistress

“I think everyone deserves the opportunity to achieve whatever they set their minds to. Receiving the award definitely helped me to do this, and it would be great if it could do the same for a lot more girls coming up into Sixth Form.”

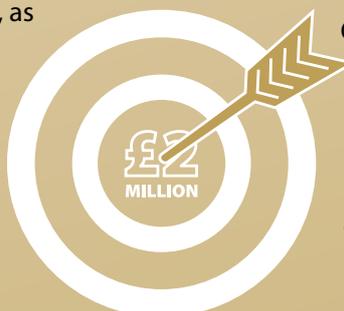
Vivi, 2020 Leaver, reading Veterinary Medicine at Cambridge

ACHIEVING THE £2 MILLION TARGET: HOW YOU CAN HELP US

It would be incredibly difficult and take many years to raise this amount through cake sales and sponsored walks. Therefore, the over-riding aim of this campaign is to raise as much money as possible, as quickly as possible, initially from as few gifts as possible, as demonstrated in the Scale of Giving below.

Often described as a 'set of handrails and not a set of handcuffs' a scale of giving identifies the ideal number of gifts required, at different levels, for the initial

target to be reached. Gifts can be made at any level over any period, but this scale will help focus our efforts on the numbers and size of gifts needed to achieve the £2 million target.



Of course, gifts received above or below those listed in the scale will be gratefully received and thankfully acknowledged by the School.

The scale also shows tax efficiencies of donating for UK tax payers.

£2 MILLION SCALE OF GIVING

1. NET ANNUAL COST 45% TAXPAYER	2. NET ANNUAL COST 40% TAXPAYER	3. GIVER'S ANNUAL PAYMENT*	4. GROSS ANNUAL GIFT	5. TOTAL GIFT (FIVE YEARS)	6. GIFTS NEEDED	7. TOTAL TARGET	8. % OF TOTAL
£	£	£	£	£	#	£	%
55,000	60,000	80,000	100,000	500,000	1	500,000	25.00
27,500	30,000	40,000	50,000	250,000	2	500,000	25.00
11,000	12,000	16,000	20,000	100,000	5	500,000	25.00
5,500	6,000	8,000	10,000	50,000	6	300,000	15.00
1,100	1,200	1,600	2,000	10,000	15	150,000	7.50
550	600	800	1,000	5,000	10	50,000	2.5
					39	2,000,000	100%

Please note:

- Legacy bequests and pledged gifts will be gratefully received.
- Gifts can be made above, below and in between the various levels.
- * denotes the annual cost of gift to a 20% basic rate taxpayer

GIFT AID

Malvern St James Girls' School is a registered charity (number 527513) so can claim back the tax paid on your donations if you are a UK taxpayer, under the Gift Aid Scheme. Higher rate tax payers, either at 40% or 45% can claim the difference between the basic rate of tax that the School reclaims and the highest rate of tax that they pay on their self assessment form, reducing the cost of each donation. The Gift Aid declaration is included on our Gift Pledge Form.



YOUR GIFT WILL CREATE...

DONATION	COST TO 40% TAX PAYER	COST TO 45% TAX PAYER	VALUE OF GIFT TO MSJ WITH GIFT AID	THIS WILL CREATE...
£	£	£	£	
30,432	22,824	20,922	38,040	One named 100% Sixth Form Bursary for a Day Girl pupil (<i>years 12–13</i>)
45,648	34,236	31,383	57,060	One named 100% GCSE Bursary for a Day Girl pupil (<i>years 9–11</i>)
73,368	55,026	50,441	91,710	One named 100% Senior School Bursary for a Day Girl pupil (<i>years 7–11</i>)
62,928	47,196	43,263	78,660	One named 100% Sixth Form Bursary for a Boarder pupil (<i>years 12–13</i>)



SHARE GIVING

Giving shares (listed on a recognised stock exchange) can be an extremely tax-effective way of donating to Malvern St James Girls' School:

- You can receive income tax relief on the market value of the shares at the time of making the donation and any associated costs. Providing you are eligible, you could deduct the donation and costs from your total income on your end-of-year tax return.
- Giving quoted shares can be done without incurring Capital Gains Tax which could otherwise apply on their sale. This exemption might be important to you if you have already reached, or are likely to reach, the annual Capital Gains Tax limit.

LEGACIES

Money left to us is exempt from Inheritance Tax and could help reduce the overall amount of tax that must be paid on your estate.

JOIN US IN OUR £2 MILLION FUNDRAISING GOAL

WHY GIVE?

Malvern St James is a special place, as are its founding schools. The ethos of excellent, all-rounded, all-girls education has helped generations of females from all backgrounds to realise their talents and to contribute to society.

We believe this is an ethos worth preserving and passing on to more extraordinary pupils from ordinary backgrounds.

If you agree, please consider supporting us and give to the Bursaries campaign in whatever way you can.

FOR FURTHER INFORMATION ON HOW YOU CAN HELP, PLEASE CONTACT:

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Registered charity number 527513



