



# BASIC FUND

## BASIC Fund School Information Guide

**The BASIC Fund** is a privately funded program dedicated to broadening educational opportunities for children by helping low-income families afford the cost of tuition at Bay Area private schools. The **BASIC Fund** scholarships are based on household size and income. Scholarships cover 25%, 50%, or 75% of the family portion of the school's tuition, up to \$2,750 per year per student. The family is responsible for paying the remaining tuition balance which must be at least \$500 (most pay more) for each school year.

The following is important information regarding the **BASIC Fund** program process.  
Please read carefully – we welcome any questions you may have.

### New Applications

New applications for new students starting school in the fall are available online starting mid-January of the same year. The deadline is usually the end March (please check our website for specific dates – [www.basicfund.org](http://www.basicfund.org)). Scholarships are awarded on a first-come, first-served basis until the deadline or until we run out of funding. Scholarship amounts are based on the family's household size and gross income.

**Current Renewing families wanting to apply for a new sibling must fill out a new application through the Existing Family Application page.** Families can access this page directly on our website starting in mid-January – <https://basicfund.org/existing-family-application/>.

Please note, families will be required to input their email and family account number to verify they are an existing BASIC Fund family and access a new sibling application. If they do not know their BASIC Fund account number, they must follow the instructions noted to have their account number emailed to them.

New applicants will have preliminary screener questions before being able to access the application. If a parent/guardian is not able to access the application, please have them call us at (415) 986-5650.

Complete applications submitted after the deadline will be put on a waitlist and will be awarded periodically through the summer if funds become available. The number of new scholarships we provide is solely based on the funding we raised for that school year.

**It is not necessary for a family to have been accepted to a private school before applying to the BASIC Fund. Families should apply to the BASIC Fund as soon as possible as there is no guarantee that funding will be available if they wait to be accepted by the school.**

To qualify for a BASIC Fund scholarship the family must meet ALL the following requirements:

1. The child(ren) will be entering PreK-8<sup>th</sup> grade and into a registered private school in Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, or Sonoma Counties in the fall.
2. At least one child will be attending private school for the first time. If the child applying for the scholarship has a sibling already attending a private school (that is not a BASIC Fund student), that sibling is also eligible and can be included in the application.

3. The child(ren) must meet all academic and admissions requirements of the private school.
4. The family must meet the BASIC Fund income eligibility guidelines outlined on the application.

Students that are currently enrolled in Pre-K or TK at your school and have not applied for the BASIC Fund can apply as a new student entering for the first time (please note – all students applying must be 3 years old by September 1<sup>st</sup> for the school year they're applying for). Also, students who enrolled at the school in January or after, can also apply as first time students, but must submit a date confirmation of when they enrolled which will need to be confirmed by the school.

***Special Consideration*** applications are for students that already attend private school and whose families are experiencing an unexpected hardship situation, such as a family death, incarceration, deportation, or an illness of a parent/guardian. The parent/guardian must complete an application, include all financial documentation, documentation proof of the hardship, a letter from the guardian explaining the reason they are applying for Special Consideration, and a letter of support from the school on behalf of the family. There is no guarantee a scholarship will be awarded. Applications will be reviewed and placed on a Special Consideration wait list and will only be awarded if additional funds are available. If a family applied for Special Consideration the previous school year and did not receive funding, a new Special Consideration application must be resubmitted to be considered for the new school year. Only complete applications will be considered.

### **Renewal Application**

The scholarship is renewable until the student graduates from 8<sup>th</sup> grade, only if the family continues to be financially eligible according to our financial guidelines, be in good standing with their school, and submits complete renewal documentation by the application deadline each year. In mid-February, the BASIC Fund will email the family their renewal application to start the

renewing process. The deadline is at the end of March each year.

### **Determining Eligibility**

New and Renewing families must upload complete updated household financial documentation for us to determine income eligibility. The BASIC Fund scholarship eligibility is determined by the total family income and household size. The family may be eligible for a 25%, 50%, or 75% scholarship **of the family portion of the school's tuition up to a maximum of \$2,750 annually per child for the school year.** In agreement with our guidelines, **families are required to pay at least \$500** to the school each school year (most pay more).

**If a renewing family states their household income may not meet our eligibility guidelines, please encourage the family to still complete their renewal application.** We usually make exceptions and provide leeway for our "over" renewing families each year. The amount of the leeway is determined by July. If the family meets the leeway, they will be eligible for a scholarship of 25% of the family portion of the school tuition. The family will be informed in the summer via email if they did or did not meet the leeway. Families who do not meet the leeway can call us the following school year to request to be reenrolled if their financial situation has changed.

**If the family is providing other financial documentation other than their Federal Tax Return (1040 Forms), such as CalWorks/CalFresh, Unemployment, Disability, etc. (see below), they must provide up-to-date income documentation.** If the financial documentation does not include information on all adults and children in the household, the family will need to include proof of address for all people in the household. Acceptable proof includes a utility bill, service bill, invoice, doctor notice, school notice, or any legal documentation with the name of the person matching the home address.

**Below are acceptable forms of financial documentation:**

- 1040 Federal Tax Form with copies of all W-2/1099 forms.  
Example: If applying for the 2024-2025 School Year, the family must provide copy of their 2022 or 2023 Federal Tax Return along with all W-2's and/or 1099 forms. Proof of address for people in the household that is not included on Tax Return must be provided. Previous Tax Return years are not accepted. If Tax Return includes business expenses, then copies of all Schedule C documents should also be included.

**NOTE:**

- W-2 and/or 1099 forms alone are not accepted as primary proof of financial documentation
  - If the family has more than 4 dependents noted on the tax return, they must include the additional tax schedule(s) that reflect the rest of their dependents
  - If the adjusted gross income (AGI) reflects a negative income, the family must provide a letter of explanation for the negative income and provide all tax schedule pages showing the breakdown of the negative income
  - **If the family claims they did not file a Federal Tax Return, the BASIC Fund may require the family to complete a 4506-C Form to verify with the IRS of non-filing**
- CalWorks/CalFresh (current) + proof of household if the information is not included
  - Disability Benefits (current) + proof of household if the information is not included
  - Foster Care Benefits (current)
  - Retirement Benefits + proof of household if the information is not included
  - Social Security Benefits (current) + proof of household if the information is not included
  - Unemployment Benefits (current) + proof of household if the information is not included
  - Worker's Compensation (current) + proof of household if the information is not included

**Employment pay stubs are NOT accepted as primary financial documentation.** This information is only requested as supporting information if we find it necessary to determine the family's eligibility.

**Note: The family will need to calculate their yearly income.** If they are using the AGI (Adjusted Gross Income) from their Federal Tax Return, input that income total unless they are using a combination of incomes, then they will need to supply the AGI (if applicable) and the calculated amount for any other additional income(s). **Depending on if it is monthly, bi-weekly, or weekly, the family will need to calculate their yearly income.** (See table below.)

OCCURRENCE	CALCULATION
Monthly	Multiply by 12
Bi-Weekly	Multiply by 26
Weekly	Multiply by 52

If there has been a divorce or separation, but the parents still filed jointly, they must include formal proof of separation. Examples of proof are a copy of the official court filed divorce proceedings (if not officially filed yet) or proof of living at different addresses. If parents have agreed to split the children's expenses for tax purposes or alternate claiming their children, the parent/guardian applying for the children must provide proof that the children live with them and a letter explaining the current situation.

If the family's financial situation is a combination of different incomes and are not sure what needs to be provided, please have them call us at (415) 986-5650.

Once the complete application is submitted, the BASIC Fund will review the application and will either approve it if it's a renewal application, or determine the new application is eligible to be awarded. The family will be informed via email if any information is missing or incomplete. Until we receive all pending information the renewal or new application will remain incomplete.

## **Terms & Conditions, Parental Requirements, and Release Form**

As part of the application process each year, the parent/guardian will be asked to review and confirm understanding and agreeing to the Terms & Conditions, Parental Requirements, and Release Form. These outline the BASIC Fund's terms for accepting the scholarship.

## **Submitting Application**

The last step (on the last tab) of the online application form, the parent/guardian will be asked to sign their full name and 'Submit' their application. If submitted successfully, they will get a confirmation pop-up message and email. If not submitted successfully, it will show the family what sections on the application form have not been entered correctly and are required for submission.

## **Determining Scholarship Award**

The BASIC Fund Scholarship award is based on the percentage the family is eligible for against the Family Portion tuition amount (the balance after subtracting the School Financial Aid from the total School Tuition, if applicable) stated by the school on the School Commitment Form.

**Scholarship awards are up to a maximum of \$2,750 per child for the school year** with families required to pay **at least \$500** (most pay more) to the school each school year.

## **Combining Scholarships**

The family cannot combine a BASIC Fund scholarship with a scholarship from another non-school-based scholarship program, such as Guardsmen, FACE or another outsourced scholarship program. School financial aid or financial aid from the Archdiocese is acceptable (if applicable). Please note: if the combination of assistance results in the family paying less than the required \$500 minimum, we will take the difference from the BASIC Fund scholarship, so they meet the minimum requirement.

## **Student Status Report (SSR)**

The BASIC Fund will email schools a Student Status Report (SSR) link in late February. You will have access to view the status of all your new and renewing students. Renewing application statuses will not be available until March once families start to complete their application. **Please keep in mind that every year we are renewing thousands of scholarships so it could take the BASIC Fund all summer to review all applications.** The status report link will be accessible until September. Please check periodically to make sure your families are complete. If you have any questions, please call the BASIC Fund at (415) 986-5650.

On the SSR you will also find an Action Items section. This is where the School Commitment Form, School Tuition Fee Schedule upload and the Annual School Registration sections are located. Once you complete each of these items, they will clear from your Action Items section.

## **Checking the Application Status**

Once a family has applied and if they have specified their school, their child will appear on the school's Student Status Report (SSR). The family can check with their school directly to have the school look up the student on their SSR, or they can call the BASIC Fund starting in March. **Please keep in mind that each year we review thousands of applications so the family's information may not yet be processed.**

## **School Commitment Form**

The school must fill out a School Commitment Form every year for every child receiving a BASIC Fund scholarship. The School Commitment Form is used to verify information regarding the student, i.e., attendance, tuition, financial aid, grade, family account status, outlines the BASIC Fund terms for the school to participate as a BASIC Fund school and most importantly helps us determine the student's scholarship amount.

A link is provided to the school through the School Student Status Report (SSR) under the Action Items section. The 'Commitment Form' section will contain a school commitment form for each eligible student that is attending your school. For new applicants, the form will be available once the family has been awarded.

If a student is receiving School Financial Aid, **DO NOT** combine the BASIC Fund scholarship amount with the School Financial Aid. We base our scholarship on the Family Portion Tuition (the balance after subtracting the School Financial Aid and all other aid from the total School Tuition). If you include an estimated BASIC Fund scholarship amount along with the School Financial Aid, we will base our scholarship on the incorrect lower amount.

The school MUST complete the Commitment Form(s) by the deadline provided. **If a Commitment Form is not received, then the scholarship for that child cannot be confirmed.**

### **Annual School Registration and School Tuition**

We have separated the BASIC Fund Annual School Registration into different sections. We will email you when each is open along with due dates. The links for each are found on your Student Status Report under the **Action Items** section. The links will remain available and active until each section of the Annual School Registration is complete. **This is a requirement to keep your school registered with the BASIC Fund** and keep us updated on any changes at your school. Part of the annual school registration requires the school to upload a copy of their updated Tuition and Fee schedules for the following school year. **Please note - scholarships cannot be calculated without your updated tuition fee schedule.** If your tuition schedule is not available by our due date, please call us to let us know when it will be available. The deadline is usually in late April.

### **Payments**

The BASIC Fund will make two payments directly to your school: the first half of the scholarship gets paid in the Fall (November) and the remaining balance in the Spring (March). For each payment, we will provide an online roster list to the schools that will include the student's name, grade, the total scholarship, and the amount of the scholarship we intend to pay for that semester payment. The school will need to review, make any corrections (if necessary) and confirm that the students are attending the school. Once the school returns the signed roster, we will begin processing the payment. This can take several weeks.

The roster for the Fall payment will be sent in October for payment in November and the roster for the Spring payment will be sent in February for payment in March.

**Please note update - our payments are based on the following months:**

- 1<sup>st</sup> payment      August – December
- 2<sup>nd</sup> payment      January – May

### **Reimbursements**

**The BASIC Fund only pays for the time the student attends your school.** Should the student withdraw after the BASIC Fund has made a payment, we will prorate the scholarship amount and ask the school for a refund via email. Please do not reimburse the family. We pay the school directly and will request reimbursement from the school. **Please note - scholarships reimbursements are prorated monthly, not daily.**

### **Outstanding Balance with School**

If we receive notice from the school that a family has an overdue tuition balance, we will notify the family via email. The family will not be able to renew their scholarship, transfer the scholarship to another private school or add a new student until we receive written notice from the school that the family has paid the balance or has set up a payment plan. We will not make any payments for the child(ren) if they have an overdue unpaid balance on their account that has not been addressed.



## **Transferring or Withdrawing**

If you have a student transferring from another private school, any balance they have at their current school must be paid in full before we can transfer the scholarship to your school. If the student is transferring mid-school year, any balance the family has with the existing school must be paid, and a new School Commitment Form must be filled out by your school. The BASIC Fund will prorate the student's scholarship and only pay for the time the student attends at each school. For a new School Commitment Form, you must call the BASIC Fund to request one.

If the student leaves the BASIC Fund prior to graduating the 8<sup>th</sup> grade, we request that we be notified of where the student will be attending school.

## **Exit Confirmation Form (ECF)**

If a student withdraws during the school year, you must fill out an Exit Confirmation Form. This informs us of the reason(s) the student withdrew from the school and if the family left with a balance. If the family leaves with an outstanding balance, we will email the family informing them that their BASIC Fund scholarship will not be renewed or transferred to another private school until we receive written notice from the school, stating that either the family has paid the balance or has made an acceptable payment arrangement with the school.

**NOTE:** If a BASIC Fund family has fallen behind on their tuition payments and you would like us to send them a letter, please call or email us.

## **Returning to the BASIC Fund**

If a student withdraws from the BASIC Fund, they will have up to two school years from the last school year the BASIC Fund made a payment on their behalf to return before 8<sup>th</sup> grade without having to reapply as a new student. The family must call us to request to renew by February for the following school year. If more than two school years have passed since the student last received funding from the BASIC Fund, they will have to reapply as a new student. New applications for the school year starting in the fall will be available in mid-January of that same year.

## **Open Houses/Family Meetings**

BASIC Fund staff are available to attend opens houses and/or family meetings to assist with online applications or any BASIC Fund matters.

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## **Special Requests**

On occasion, we will ask you to distribute information to our BASIC Fund families and students, e.g., providing our 8<sup>th</sup> graders with an 8<sup>th</sup> Grade Exit Survey, flyers for special events, etc. In addition, our donors occasionally request to visit a school and we may request some time from you. We will give you plenty of notice and appreciate your cooperation.

## **Additional Information**

Find and follow us @BASICFund on Facebook, Twitter, Instagram or check out our website at [www.basicfund.org](http://www.basicfund.org). We provide additional information regarding summer programs, family events, alumni resources, and family services available throughout the Bay Area – let us know if there's any information you would like us to help share with BASIC Fund families!