

Means-Tested Bursary for Boarding Policy

Staff reviewer:	Scrutinised by link Governor:	Date signed off at Committee:	Date approved at Board:	Next review date:
Kerry Burnham	Dave Tarbet, Jan 2019	Finance and Resources 12/03/19	FGB 26/03/19	January 2020

1 Purpose

Exeter Mathematics School is committed to ensuring those who would most benefit from its specialist curriculum are able to access the School regardless of family income or location of home-town. To facilitate access to the school, EMS will provide accommodation from Monday to Thursday for those who would otherwise be unable to attend.

The cost of the accommodation will be met by the families of students. Bursary funding is available to support those who cannot meet this cost. The purpose of this policy is to provide a clear and fair framework for allocating bursaries.

2 Definitions

Bursary – financial support to meet (part of) the cost of residential accommodation at EMS

Parents – parents or guardians

3 Policy

Bursaries will be allocated for accommodation according to need based on the following 3 criteria:

- The family's ability to meet the cost of accommodation
 - The location of family home
 - The student's need to attend EMS
1. The family's ability to meet the cost of accommodation will be determined through means-testing. Information relating to the family's income and expenditure will be considered.
 2. If it is feasible for a student to commute each day they will not be eligible for a bursary. Where a student lives too far away for a daily commute to be possible, they will be prioritised over border-line cases.
 3. The results of the entrance test, teacher's reference, interview and application form will be used to determine the extent to which attending EMS will make great a positive difference to each student. Those who are considered most in need of this specialist curriculum will be prioritised for bursaries.

Income Bands

Students coming from households with incomes of less than £16 190 that are entitled to Free Meals are considered exceptional cases and will receive a full bursary, meaning they will pay only a nominal contribution towards accommodation.

Those from families with household incomes below £25 000 will receive the maximum level of bursary funding, resulting payments of less than £300 for accommodation (£1000 when food is included).

Those with household incomes above £25 000 will be means tested for bursaries.

Means Testing

The amount of bursary will be determined by the extent of financial need. Each case is assessed on its own merits and bursaries are awarded accordingly, subject to the school's ability to fund these. A decision regarding the level of sacrifice a family should make to pay accommodation fees will be personal and is a matter for the family and not the school. However, EMS has a duty to ensure that all bursary grants are well focused and so, in addition to current earnings, other factors will be considered in determining the level of bursary:

- The ability of the family to improve their own financial position. For example, where there are two partners, both are expected to be employed unless prevented from doing so through incapacity, the need to care for pre-school children or the requirements of their partner's work.
- Opportunities to release capital. Significant capital savings and investments would be expected to be used to meet the cost of accommodation.
- In cases of separation, the contribution made by the absent parent
- Contributions to the household income by other, wider family members or by outside sources
- Outgoings will be considered such as fees paid to support siblings at university
- The following would not be consistent with the receipt of a bursary:
 - Frequent or expensive holidays
 - New or luxury cars
 - A second property/land holdings
 - Investment in significant home improvements

Annual Review

All bursary awards are subject to repeat testing each year and may be varied upwards or downwards depending on parental circumstances. Current bursary holders will be issued with a repeat means-testing form at the beginning of April each year for return by the end of the month.

The headteacher has the discretion to recommend to the governors the reduction or withdrawal of a bursary where a student's attitude and/or behaviour has been unsatisfactory and/or where a parent has failed to support the school, for example by the late payment of any contribution they are making to the accommodation costs.

Allocation of Surplus Funding

Students will be offered a bursary at the time of being offered a place at EMS. The funding available for bursaries will be dependent upon the number of students in accommodation and may therefore be adjusted once offers have been accepted or declined. Any residual funding will be reserved for the year to support students who may experience a change in circumstance leading to the need of further support.

Should funding still remain at the end of the academic year, it will be carried forward and allocated the following year.

4 Implementation

Application Process

1. Parents seeking a bursary complete the application form. This form, which requests details of income, capital and expenditure, must be accompanied by full documentary evidence.
2. All applications are assessed to establish the likely level of support that will be required to enable students to attend the school. This may require further contact with families to ensure the information has been correctly interpreted and the basis of the financial assessment is fair. A home visit may be made when determining the level of need.
3. The total level of support offered is agreed by the school board.
4. Parents and students are advised whether they will be offered a bursary and the amount of bursary they will receive.
5. Parents accept the place in accommodation and agree to any conditions relating to the bursary by paying an initial deposit.

Confidentiality

Bursaries will be allocated by the Headteacher and School Business Manager. All information contained in the Residential Bursary Application Form will be held securely and seen only by the Headteacher, School Business Manager and Finance Assistant.

The allocation of bursaries will be confidential: the Headteacher, Business Manager, Finance Assistant and Pastoral Leader will be the only staff aware of bursary provision. This information will not be shared with other staff or with any students.

5 Associated Documentation

Bursary Guidance Notes for Parents

Residential Bursary Application Form

6 Monitoring, Review and Evaluation

This policy will be reviewed annually by the Headteacher and Governing body.

7 Equality analysis

Answer questions 7. 1- 7. 5

7. Equality Analysis

Please use the 'equality analysis procedure' to guide you to complete the text boxes below, expanding them as you wish. If this is a review - please add date and make any amendments if required.

25/01/18

7.1. Is your policy equality- relevant? If yes, please list which groups of people will be affected by this policy.

If no people are affected by this policy it has no equality relevance and you should write no and you need not answer any more questions. **NO**

7.2. How have you involved people from minority groups who may be affected by this policy?

Describe any activities such as conversations, interviews, feedback or plans to do this in the future. *Write here*

7.3. What evidence have you considered? List any sources of data and research you have used. This can include college or national monitoring data, surveys, reports, consultations, focus groups, pilots, evaluations. Describe any ongoing data collection or plans for future research. *Write here*

7.4. How will your policy fulfil the public sector duty by helping fight discrimination, advance equality of opportunity and foster good relations?

Characteristic	How does your policy help fulfil the public sector duty? What Equality issues have you addressed?
Age	<i>Write here</i>
Disability	
Gender	
Pregnancy & maternity	
Race	
Religion and belief	
Sexual orientation	
Transgender	

7. 5. Describe any potential adverse impacts that may arise as a result of the policy. If any are identified, you should also state what actions will be taken to mitigate that negative impact. If yes, say if you have an action plan to carry this out? *Write here*