



# Boarding Bursary Policy

<b>Staff reviewer:</b>	<b>Scrutinised by link Governor:</b>	<b>Date signed off at Committee:</b>	<b>Date approved at Board:</b>	<b>Next review date:</b>
Nicola Mitchell	Dave Tarbet	March 2021	NA	January 2022

# 1 Purpose

Exeter Mathematics School (EMS) 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 within the catchment area. To facilitate access to the school, EMS provides boarding from Monday to Thursday for those who would otherwise be unable to attend.

The cost of boarding is met by the families of students. Bursary funding is available, to support those who are eligible, to 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 (all or part of) the cost of residential accommodation at EMS, excluding food.
- Parent/s** Parent/s are defined as:
- the natural father and mother of the student where they live together and the student normally resides with them; or
  - the parent of the student with whom the student normally resides and the partner (if any) of that parent where the partner normally resides with that parent and the student in the same home; or
  - the student's guardian appointed in accordance with section 5 of the Children Act 1989 and the partner (if any) of that guardian where the partner normally resides with that parent and the student in the same home; or
  - the person with whom the student normally resides in accordance with EITHER a subsisting residence order made under section 8 of the Children Act 1989 OR a subsisting court order which specifies who is to have actual custody or care and control of the student; or
  - where a student has no parents defined above or the school is satisfied that no such parents can be found, and he/she is looked after by a local authority or provided with accommodation within the meaning of section 105(1) of the Children Act 1989, the local authority would pay the accommodation fees.; or
  - where none of the above applies, the parent is the person with whom the student 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 parent and the student in the same home.
- Family Home** A group of one or more parents and their children living together as a unit.  
Primary residence of the student

### 3 Policy

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

- The family's disposable income.

Disposable income is the amount of money that parents have available for spending and saving after direct taxes (such as Income Tax, National Insurance and Council Tax) have been accounted for. It includes income from employment, private pensions and investments as well as cash benefits provided by the state.

- The need of boarding accommodation.

If it is feasible for a student to commute each day, they will not be eligible for a place in accommodation and therefore a bursary. Other than exceptional cases (for example, those with SEND needs which are best met through boarding), students in boarding accommodation will have more than a 1 hour commute in each direction between home and school.

The boarding bursary provides support for accommodation costs only. This includes all costs associated with staying in the boarding accommodation (e.g. rent, utilities, staffing, basic insurance) but does not include the cost of food.

Those entitled to Free Meals will have the cost of their food in boarding reduced by the total amount they are entitled to (the daily rate for Free Meals multiplied by the number of days in attendance). Please contact [finance@exeterms.ac.uk](mailto:finance@exeterms.ac.uk) to apply for Free Meals.

When first allocated, a boarding place and any associated bursary are secured for the full duration remaining of the student's course at EMS, provided they do not behave in a manner which results in their boarding place being withdrawn and/or have a significant change in circumstances.

#### 3.1 Income Bands

Bursary towards the costs of boarding is allocated as follows:

Income bands (Parents disposable income)	Proportion of accommodation cost families need to pay	Level of bursary
Under £24,100	0%	Full (100%)
£24,101 - £31,100	10%	Partial (90%)
£31,101 - £36,100	20%	Partial (80%)
£36,101 - £38,400	40%	Partial (60%)
£38,401 or above	100%	Nil

## 3.2 Special Consideration

Families who face a significant change in financial circumstances after the bursary assessment has been made (e.g. redundancy or closure of business resulting in a significant reduction in disposable income) are encouraged to contact the school via [finance@exeterms.ac.uk](mailto:finance@exeterms.ac.uk) and seek to apply for 'special consideration'. As part of this process, the ability of the family to pay for the remainder of the academic year can be reviewed and reassessed, and a new payment plan agreed. The amount of bursary may be amended if there is sufficient need and families supply adequate evidence, in line with the normal bursary application process, to prove their material change in circumstances.

Those who have a temporary loss of income due to the pandemic may have their payments reviewed within the year and an alternative payment plan agreed. Families are encouraged to contact the school via [finance@exeterms.ac.uk](mailto:finance@exeterms.ac.uk) to discuss their needs.

## 4 Implementation

### 4.1 Application Process

1. Parents seeking a bursary complete an application form (normally online but families may request a paper copy). This form, which requests details of income and direct taxes, must be accompanied by full documentary evidence.

To declare all income parents must include:

- Money from employment before Tax (PAYE) and National Insurance, including if unable to work but still getting paid ('on furlough') - check P60s, P45s or payslips
  - Earnings if self-employed before Tax (PAYE) and National Insurance, including grants from the Self-Employment Income Support Scheme - check Self-Assessment tax return.
  - Benefits from employer (check P11D)
  - State benefits including:
    - Working Tax Credits
    - Universal Credit
    - Child Tax Credits
  - The foreign equivalents of UK tax-free benefits
  - Money from a pension - including State Pension
  - Interest on savings
  - UK company dividends
  - Profit from a property owned or rented out in the UK
  - Earnings from the Rent a Room Scheme above £7,500 (or £3,750 if a joint owner)
  - Payment above £30,000 because a job ended
2. Parents complete a declaration on the application form to confirm full and accurate information regarding all income and direct taxes has been given.

3. Parents are advised whether they will be offered a bursary and the amount of bursary they will receive.
4. Parents accept the place in accommodation and agree to any conditions relating to the bursary by paying an initial deposit and returning signed copies of the Accommodation Agreement and the Payment Plan.
5. Parents complete a declaration in April of the first year to determine whether there needs to be a reassessment of bursary for the second year.

Any parent unable to complete an online application can contact the school via [finance@exeterms.ac.uk](mailto:finance@exeterms.ac.uk) or alternatively ring (01392) 429020 to request a paper copy to be sent in the post.

## 4.2 Confidentiality

All information contained in the Boarding Bursary Application Form will be stored securely and seen only by the Headteacher, School Business Manager and Finance Officer.

The allocation of bursaries will be confidential: the Headteacher, Business Manager, Finance Officer 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

Boarding Bursary Application Form

[Free Meals in Further Education Guidance \(2014\)](#)

## 6 Monitoring, Review and Evaluation

This policy will be reviewed annually by the School Business Manager, Headteacher and Governing body.

## 7 Equality analysis

The following equality analysis (EA) section should be completed by the policy holder as part of every policy review and carries the same date as the main policy. EAs are particularly helpful in revealing any unintended, indirect discrimination.

Under the Equality Act (2010) we have a duty to;

- Eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Act.
- Advance equality of opportunity between people who share a protected characteristic and those who do not.

- Foster good relations between people who share a protected characteristic and those who do not.

We need to consider each protected characteristic individually and in combination. The interaction of different layers of characteristics is called intersectionality. This recognises that the barriers for each group are not homogenous, and instead are a combination of layers of identity interacting. For further detail or to support the completion of the following, please see our equality and diversity policy.

<p>1. <b>Evidence considered</b> <i>What data or other information have you used to evaluate if this proposal is likely to have a positive or an adverse impact upon protected groups when implemented? Where were information gaps, and what steps can you take to remedy these gaps? Can the RM Intelligence Dashboard (student counts) provide any insight into which protected characteristics are likely to be affected by the changes?</i></p> <p>Financial data of previous bursary applications  Withdrawal of applications to accommodation from bursary applicants  Data on administration processes</p>					
<p>2. <b>Consultation.</b> <i>How have you consulted staff and student communities and representatives including those from protected groups? What were their views? Who else has been consulted in this proposal?</i></p> <p>Feedback sought from families who applied for a bursary and subsequently withdrew their accommodation application and the Senior Leadership Team  Consultation took place with ESFA, DfE, Governors and Finance Staff at the school</p>					
<p>3. <b>Promoting equality.</b> <i>Does this policy have a positive impact on equality? What evidence is there to support this? Could it do more?</i></p> <p>Yes, through the removal of a means tested bursary application, data showed that disadvantaged families would receive more bursary support with this scheme.</p>					
<p>4. <b>Identifying the impact of policies</b></p> <p>Identify any issues in the document which could have an adverse impact on the following groups who are protected by the Equality Act 2010:</p> <p>1. People from different age groups [age]  2. Disabled people [disability]  3. Women and men [sex]  4. Transgender people [gender identity]  5. Lesbians, gay men and bisexual people [sexual orientation]  6. Women who are pregnant or on maternity leave [pregnancy and maternity]  7. People who are married or in a civil partnership [marriage and civil partnership]  8. Religious people or those with strongly held philosophical beliefs [religion and belief]  9. Black and minority ethnic people [ethnicity]</p> <p>None</p>					
<b>Issue Assessed</b> <i>E.g. policy section or practice.</i>	<b>Protected Group</b>	<b>Impact and Evidence</b> <i>What are the possible impacts on people from the protected groups above, and explain how you have made that assessment. Are these impacts positive or negative?</i>	<b>Justification</b> <i>Can the issue be justified for academic or business reasons? Please explain.</i>	<b>Proposed Action/Timeline</b> <i>If this has a negative impact, what will you do to reduce, minimise or eliminate negative impact? If this has a positive impact, how will you promote, develop or utilise this opportunity?</i>	<b>Person responsible for action(s)</b>
<p>5. <b>Monitoring</b> <i>How will you monitor the actual impact that your proposal has had following its implementation? When will you do this?</i></p> <p>An evaluation of the process and withdrawals from accommodation will be monitored annually</p>					
<p>6. <b>Summary</b> <i>Summarise the outcome of this Equality Assessment, and state any actions you will be taking as a result.</i></p> <p><b>This policy is equitable</b></p>					