



2 September 2019



Thank you for your email of 5 July 2019 to the Ministry of Education requesting the following information:

- *"all internal and external reports, briefings, memos and/or papers regarding or containing any aspects of Boarding Allowance produced or received by the Ministry of Education since 1 July 2017"*

Your request has been considered under the Official Information Act 1982 (the Act).

We understand you have previously received excerpts from two briefings about the Boarding Allowance from the Minister of Education that would also be in scope of your current request. As such we have excluded these in this response.

We have identified nine further documents in scope of your request. We are releasing five of these documents to you in full and the other four in part, with some information withheld under sections 9(2)(a) and 9(2)(g)(i) of the Act to protect the privacy of natural persons and the free and frank sharing of opinion or advice.

Please note, the Ministry now proactively publishes OIA responses on our website. As such, we may publish this response on our website after five working days. Your name and contact details will be removed.

Thank you again for your email. You have the right to ask an Ombudsman to review this decision. You can do this by writing to info@ombudsman.parliament.nz or Office of the Ombudsman, PO Box 10152, Wellington 6143.

Yours sincerely



Katrina Casey
Deputy Secretary
Sector Enablement and Support

OIA: 1198784

National Office, Mātauranga House, 33 Bowen Street, Wellington 6011
PO Box 1666, Wellington 6140. Phone: +64 4 463 8000 Fax: +64 4 463 8001

Document Table

Document Number	Date	Document Title/Description	Decision on Release
1	20/07/2017	Budget Forecast and proposed changes to budget	Released in part with some information withheld under section 9(2)(g)(i) of the Act.
2	25/08/2017	Email: Boarding Allowances Attachment: <i>Boarding_2015_17_Payments_Final.xlsx</i>	Released in full.
3	13/11/2017	Memo: Final recommendations arising from the boarding allowance review	Released in part with some information withheld under section 9(2)(g)(i) of the Act.
4	07/03/2018	Memo: Boarding Allowance applications received in 2018	Released in full.
5	14/05/2018	Email: Response ; Boarding allowances: update on 2017 student numbers Attachment: <i>V1_BISA 786 Boarding Programs.xlsx</i>	Released in full.
6	23/05/2018	Memo: 2017 Boarding Allowance review	Released in part with some information withheld under section 9(2)(g)(i) of the Act.
7	15/06/2018	Email: Meeting with Rural Women NZ Attachment: <i>Info for meeting with Rural Women NZ – Final.docx</i>	Released in full.
8		Boarding Hostels and Boarding Allowances	Released in part with some information withheld under section 9(2)(a) of the Act.
9		Information requests from Education and Workforce hearing for Vote Education	Released in full.

Growth	Student Numbers 20 July 2017	Final option for 17/18 and outyears to 21/22				
		2017/18	2018/19	2019/20	2020/21	2021/22
		Student Growth				
			5%	6%	7%	8%
Access Boarding Allowance	769	3,076,000.00	3,229,800.00	3,260,560.00	3,291,320.00	3,322,080.00
			-	-	-	-
Access travel payment - Pitt Island and Chatham Island* not driven by student numbers		400,000.00	400,000.00	400,000.00	400,000.00	400,000.00
			-	-	-	-
			-	-	-	-
Access travel payment Great Barrier Island	25	37,500.00	39,375.00	39,750.00	40,125.00	40,500.00
			-	-	-	-
Multiple Barrier Boarding Hostel	783	6,655,500.00	6,988,275.00	7,054,830.00	7,121,385.00	7,187,940.00
Multiple Barrier Private Board Allowance	50	200,000.00	210,000.00	212,000.00	214,000.00	216,000.00
			-	-	-	-
Multiple Barrier Pastoral Care Payment	833	416,500.00	437,325.00	441,490.00	445,655.00	449,820.00
			-	-	-	-
Total Projected Spend		10,785,500.00	11,304,775.00	11,408,630.00	11,512,485.00	11,616,340.00
Total Budget		11,319,000.00	11,319,000.00	11,319,000.00	11,319,000.00	11,319,000.00
Under/Over		533,500.00	14,225.00	- 89,630.00	- 193,485.00	- 297,340.00

Allowance	Current Rates	Released under the Information Access Act	Student Numbers 20 July 2017		Current Total Cost
Access Boarding Allowance	3,200.00		769		2,460,800.00
Access travel payment - Pitt Island and Chatham Island	400,000.00				400,000.00
	Approx annual cost for 4 return trips/students/year				
Access travel payment Great Barrier Island	920.00		25		23,000.00
Multiple Barrier Boarding Hostel	7,500.00		783		5,872,500.00
Multiple Barrier Private Board Allowance	4000		50		200,000.00
Multiple Barrier Pastoral Care Payment	500.00		833		416,500.00
			Total		9,372,800.00
			Budget		11,319,000.00
			Variance		1,946,200.00

s 9(2)(g)(i) OIA

REDACTED

Released under the Official Information Act 1982

Alan Ryan

From: SE and S Data Requests
Sent: Friday, 25 August 2017 1:00 PM
To: Kate Ford
Cc: Jennifer Lowe; SE and S Data Requests
Subject: RE: Boarding Allowances
Attachments: Boarding_2015_17_Payments_Final.xlsx

Follow Up Flag: Follow up
Flag Status: Completed

Hi Kate,

As discussed, please find the number of students paid in each term for each boarding allowance category.

Please let me know if you have any questions.

Cheers,
 Jibu.

Jibu Stephen | Analyst | Business Analysis and Systems
 DDI +6444395421 | Ext 45421

From: Kate Ford
Sent: Tuesday, 8 August 2017 11:46 a.m.
To: SE and S Data Requests
Cc: Jennifer Lowe
Subject: Boarding Allowances

Kia ora

We are looking for some data to assist with a review of the Boarding Allowances scheme.

We need to get snapshot numbers of students on the scheme at 2 points in the year.

Scheme	Number of active students at 1 March 2015	Number of active students at 1 September 2015	Number of active students at 1 March 2015	Number of active students at 1 September 2016	Number of active students at 1 March 2017	Number of active students at 1 August 2017
Boarding allowance multi barrier						
Boarding allowance access barrier						
Boarding Bursaries						
Māpihi Pounamu						

Very happy to talk to someone about the detail if we need to refine it.

Number of students paid each term under Boarding Allowances schemes from 2015 to present.

Scheme	Term 1 2015	Term 2 2015	Term 3 2015	Term 4 2015	Term 1 2016	Term 2 2016	Term 3 2016
Boarding allowance multiple barriers ¹	441	490	507	498	636	612	666
Boarding allowance access barrier ¹	466	502	512	525	588	511	606
Boarding Bursaries ²	866	826	799	772	472	448	406
Māpihi Pounamu ¹	176	167	159	152	84	68	74

¹Number of students paid between January-March: Term 1, April-June: Term 2, July-September: Term 3, October-December: Term 4 (for a given year). The term, even if there are multiple payments for the student during the term.

²Number of students with approved date before January and term last paid is greater than or equal to Term 1 is counted in Term 1, approved date before A to Term 2 is counted in Term 2 etc. (for a given year). There are two students with no NSN and they are included in the counts.

Term 4 2016	Term 1 2017	Term 2 2017
652	757	794
611	699	748
395	189	167
73	28	29

student is counted only once per scheme per

April and term last paid is greater than or equal

MEMO

David
I cannot approve this =>

To: Katrina Casey, Deputy Secretary Sector Enablement & Support
From: David Wales, National Director Learning Support
Cc: Nicky Hampshire, Group Manager Service Delivery, Learning Support
Jason Ragg, Manager Provider Services – Learning Support
Date: 13 November 2017
Subject: Final recommendations arising from the boarding allowance review

Purpose

1. This memo reports on the results of the financial modelling undertaken as a result of the boarding allowance review; an assessment of whether the proposed changes to the Access and Multiple Barrier allowances can be managed out of existing baseline for the next four financial years, and makes final recommendations on the proposed changes.
2. A decision is sought on the final recommendations now as families are organising boarding arrangements for 2018.

Background

Establishment of the boarding allowance scheme

3. The Boarding Allowance Scheme was established in May 2013 and implemented on 1 June 2014. The establishment of the scheme merged the existing Māpihi Pounamu and Boarding Bursaries schemes, and created two new boarding allowances – the Access allowance and the Multiple Barriers allowance.
4. Secondary school students are the main recipients of boarding allowances and, on this basis, funding for an individual student would last five years. However, there are a small number of primary school students who also receive boarding allowances, and they may receive the allowance for longer than five years. Once a student is receiving a boarding allowance it will continue for as long as the student is at school, or until the barriers they face no longer exist.
5. The Access and Multiple Barriers allowances are two distinct schemes but come under a single administrative banner. The 2013 merger prioritised Government support for the Multiple Barriers scheme as it helped address some of the complex needs faced by at-risk students.

Description of boarding allowances

Access Assistance for students who are geographically isolated and the School Transport Assistance programme is not sufficient to support attendance at their nearest secondary school.

Students on Great Barrier Island receive a transport payment for six trips while students from Pitt Island and the Chatham Islands receive a transport payment for four return trips.

Multiple Barrier	Assistance for students who face multiple barriers to attend their nearest secondary school and who are at risk of not achieving NCEA Level 2 or higher. Students can either receive an allowance for boarding in a hostel or for private board (the majority receive the hostel boarding allowance). All students in the Multiple Barrier scheme are eligible for a pastoral care allowance.
Māpihi Pounamu	Assistance for students with difficult home circumstances enrolled in Year 9 and above who face barriers to learning, to ensure they participate and achieve in education. The allowance is open to all secondary school students of all ethnic groups.
Boarding Bursary	There are several types of Boarding Bursary. The Distance category provides an annual allowance to subsidise boarding fees and some travel costs of primary and secondary school students who must live away from home to receive their education, either because of the distance of the nearest school or bus service from their home. There are also subject bursaries, given because certain approved subjects are not available at their schools. The other main category is known as Category D – recipients are approved by Special Education staff in local Ministry of Education offices in cases where students needed to be away from their local area for schooling. Bursaries are awarded according to the School Boarding Bursaries Regulations 1972.

Boarding allowance appropriation

6. The total boarding allowance appropriation for the 2017/18 budget is \$11,319,000. This appropriation has a current surplus of \$1,946,200 as at September 2017. Boarding allowances is a standalone appropriation which means it cannot be blended with funding from other appropriations, and shortfalls cannot be funded from within the departmental budget. Furthermore, any annual surplus within the boarding allowance appropriation cannot be carried over into future financial years and any underspend must be returned to Treasury.
7. The Ministry makes four boarding allowance payments to schools during the academic year (in Week 3 of each term). The school will then transfer the money to the boarding hostel, or to the family where there is a private boarding arrangement.

Boarding Allowance Review: findings and recommendations

8. In May 2017 the Service Support team completed a review of boarding allowances. The establishment of the Boarding Allowance Scheme in 2013 allowed for a review every three years (METIS MIB 766200 refers).
9. The May 2017 review had an improvement focus, considering whether the value of the allowance and associated payments were still appropriate and whether eligibility thresholds for the Access allowance were at the right level.
10. Review findings were communicated to scheme participants and interest groups for comment, for example, Federated Farmers, COMET Auckland/Great Barrier Island Community, and Rural Women of New Zealand. The Boarding Association of New Zealand also provided feedback.

May 2017 review

11. In summary, the review found:
 - Based on current patterns of support and values, the boarding allowance appropriation will be fully committed by the end of the 2018 calendar year. However, the review

noted that this finding was based on simple and limited modelling and recommended more advanced financial forecasting be undertaken.

- An adjustment to allowances is not affordable as it will result in an increased budget spend of 13 percent based on the 2016 allocation.
- For low income families, the current value of the Multiple Barriers allowance is a barrier to boarding.
- For low income families, particularly those with more than one child boarding, the current value of the Access allowance can be a barrier to boarding.
- The value of the transport payment to students from Great Barrier Island, Pitt Island and the Chatham Islands, is sufficient but the number of trips supported could be increased.

s 9(2)(g)(i) OIA

Review recommendation

Proposed changes to boarding allowances

14. Based on the review findings, Provider Services propose an increase to the Access and Multiple Barriers boarding allowances starting from the 2018 calendar year, as set out in Table 1.

Table 1 Proposed changes to the value of the Access and Multiple Barriers boarding allowances

Allowance	Current allowance or total cost ¹	Proposed change	Amount of increase and % change
Access boarding allowance	\$3,200		
Access travel payment – Pitt Island and Chatham Islands	\$400,000		
Access travel payment – Great Barrier Island	\$920		
Multiple Barrier hostel boarding allowance	\$7,500		
Multiple Barrier private board allowance	\$4,000		
Multiple Barrier pastoral care payment	\$500		

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Boarding allowances

15. Families in the Multiple Barrier scheme would prefer the boarding allowance to increase rather than the private board allowance or pastoral care payment.

¹ All are per student costs except the Pitt Island and Chatham Island travel payment which is the total annual figure.

Travel payments

16. There has been strong advocacy from Great Barrier Island families to increase the travel amount paid to families. The travel payment in the Access scheme is not specifically earmarked for travel and can be spent on board, travel, or other expenses.
17. There has been no advocacy from Pitt Island and Chatham Island families to increase the numbers of trips to and from New Zealand. \$400,000 is the budgeted annual amount to cover travel for all boarding students to and from Pitt Island and the Chatham Islands, and we do not propose to change either the number of trips or the budgeted amount. This can be reviewed at a future date if travel costs increase or there is a request to increase the number of trips.

Student numbers

18. The trend since January 2015 is that numbers of students receiving the Access boarding allowance and Multiple Barrier hostel boarding allowance have increased at the beginning of each calendar year since 2015. Numbers in the Access and Multiple Barrier scheme are set out in Table 2. However numbers can also fluctuate during the academic year, for example, students in the Multiple Barrier scheme may move between private board and hostel boarding.

Table 2 Student numbers in the Access and Multiple Barriers boarding allowance schemes as at 20 July 2017

Allowance	Student numbers, Term 1 2015	Student numbers as at 20 July 2017
Access boarding allowance	466	769
Multiple Barrier boarding allowance	441	833

Financial forecasting

19. The approach taken for the financial modelling was to take the proposed increases to the Access and Multiple Barriers allowance in Table 1 and forecast the financial impact over the next four years.
20. The forecasting model contained in Table 3 includes an assumption that numbers of students receiving boarding allowances will continue to increase, and student growth of between 5%-8% has been included in the forecasting model. The assumption behind student growth is based on the increase in student numbers receiving boarding allowances since 2015 (refer Table 2).

Recommended approach

24. We propose taking the following approach:

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25. Finance has confirmed the financial forecasting and, in particular, that the forecast possible overspend in the 2019 calendar year can be managed from within the boarding allowance appropriation.

26. A cap on student numbers receiving boarding allowances was not considered as an alternative, as it would mean students being excluded from accessing education.

Table 3 Forecasting of the cost of proposed increases to boarding allowances, 2017/18 to 2021/22

Final option for 17/18 and outyears to 21/22						
Financial year		2017/18	2018/19	2019/20	2020/21	2021/22
Calendar year		2017	2018	2019	2020	2021
Boarding allowance	Student numbers 20/7/17	Student Growth (based on 2017 numbers)				
			5%	6%	7%	8%
Access Boarding Allowance	769	3,076,000.00	3,229,800.00	3,260,560.00	3,291,320.00	3,322,080.00
Access travel payment Pitt Island and Chatham Island	25	400,000.00	400,000.00	400,000.00	400,000.00	400,000.00
Access travel payment Great Barrier Island	25	37,500.00	39,375.00	39,750.00	40,125.00	40,500.00
Multiple Barrier Boarding Hostel	783	6,655,500.00	6,988,275.00	7,054,830.00	7,121,385.00	7,187,940.00
Multiple Barrier Private Board Allowance	50	200,000.00	210,000.00	212,000.00	214,000.00	216,000.00
Multiple Barrier Pastoral Care Payment	833	416,500.00	437,325.00	441,490.00	445,655.00	449,820.00
Total Projected Spend		10,785,500.00	11,304,775.00	11,408,630.00	11,512,485.00	11,616,340.00
Total Budget		11,319,000.00	11,319,000.00	11,319,000.00	11,319,000.00	11,319,000.00
Under/Over		533,500.00	14,225.00	- 89,630.00	- 193,485.00	- 297,340.00

REDACTED

MEMO



To: David Wales, National Director, Learning Support
From: Jason Ragg, Provider Services, Kate Ford, Adviser
Date: 7 March 2018
Subject: Boarding Allowance applications received in 2018.

BACKGROUND

1. Applications for Boarding Allowances officially close on 31 October in the year prior to the student taking up the funding. In practice, we process all that arrive before the end of the year so that they have some certainty about their options for the start of their school year. Most of them are transitioning to secondary school.
2. Enforcing the closing date has not proved to be practical. It is advertised on the website, but family circumstances change and late applications come in because of a death in the family, a parent losing their job, an unexpected move or change of circumstances. Another reason for our flexibility is that the predecessors to Boarding Allowances – Boarding Bursaries and Māpihi Pounamu – did not have a closing date, and schools and families are not used to such a barrier.
3. Each term we assess the applications that come in and run an assessment process so that those who are successful can be funded from the start of the following term.
4. We also offer to treat urgent applications speedily. We consider as urgent the students who are out of school (non-enrolled), those living in very challenging circumstances, and those who have started as boarders, but will have to leave as there is insufficient funding to pay for their board. We rely on advocates (police, social workers, psychologists, etc) to alert us to the urgency of the situation though we check all incoming applications to see if they would fit the “urgent” category.
5. Since the start of the year, we have received 43 Access barrier applications, and 50 Multiple Barriers applications. Of these, we made an assessment that 39 could be potentially urgent. We ran an assessment process, and 36 of them have been assessed as meeting the criteria, and are eligible for a Boarding Allowance.

6. If we were to fund them for term 1, the extra cost would be \$62,000 for that term, and for subsequent terms.
7. Marilyn Kan advises us that at the end of February we had spent \$6,689,316 of the total budget of \$11,319,000. Since then we have spent \$265,385. There is one further payment to come in this financial year. This is the term 2 payment, and it should be around \$2.5m.
8. These projections leave a surplus of \$1.86m

RECOMMENDATION

I recommend that you agree to grant Boarding Allowances to the 36 students who have been assessed as eligible for this allowance, to start in term 1 2018.

agree

disagree

David Wales
National Director
Learning Support

_____ date

Alan Ryan

From: SE and S Data Requests
Sent: Monday, 14 May 2018 10:25 AM
To: Jennifer Lowe
Subject: Response ; Boarding allowances: update on 2017 student numbers
Attachments: V1_ BISA 786 Boarding Programs.xlsx

Follow Up Flag: Follow up
Flag Status: Flagged

Hi Jennifer,

Please see the attached spreadsheet.

Thank you

Regards
 Kavitha

Kavitha Krishnan | Analyst | Business Analysis & Support
 DDI +6444632882

From: Jennifer Lowe
Sent: Friday, 11 May 2018 12:29 p.m.
To: SE and S Data Requests <SEandS.Datarequests@education.govt.nz>
Cc: Dario Puglisi <Dario.Puglisi@education.govt.nz>
Subject: RE: Boarding allowances: update on 2017 student numbers

No problem, thanks for the update ☺

Jennifer Lowe | Senior Adviser | Provider Services, Learning Support
 DDI +64 4 4395431

From: SE and S Data Requests
Sent: Friday, 11 May 2018 11:52 a.m.
To: Jennifer Lowe <Jennifer.Lowe@education.govt.nz>
Cc: Dario Puglisi <Dario.Puglisi@education.govt.nz>
Subject: RE: Boarding allowances: update on 2017 student numbers

Hi Jennifer,

The data is currently sitting with another analyst for a quick peer review process.

I will touch base with Dario to see how he is getting along with this request.

Thank you
 Regards

To: Jennifer Lowe <Jennifer.Lowe@education.govt.nz>

Subject: RE: Boarding allowances: update on 2017 student numbers

Hi Jennifer,

Thank you for your email. Could you please advise on the due date for this data request?

Regards

Kavitha

Kavitha Krishnan | Analyst | Business Analysis & Support
DDI +6444632882

From: Jennifer Lowe

Sent: Friday, 4 May 2018 8:16 a.m.

To: SE and S Data Requests <SEandS.Datarequests@education.govt.nz>

Subject: Boarding allowances: update on 2017 student numbers

Morena,

Can I please get an update on the number of students in the boarding allowances scheme in 2017, if this information is available?

In January I received the attached report which showed numbers up to 2016, but I'm wanting an update for the Learning Support leadership team.

Many thanks

Jennifer

Jennifer Lowe | Senior Adviser | Provider Services, Learning Support
DDI +64 4 4395431
33 Bowen St, Wellington

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We get the job done *Ka oti i a mātou ngā mahi*
We are respectful, we listen, we learn *He rōpū manaaki, he rōpū whakarongo, he rōpū ako mātou*
We back ourselves and others to win *Ka manawanui ki a mātou, me ētahi ake kia wikitoria*
We work together for maximum impact *Ka mahi ngātahi mō te tūkinga nui tonu*

Great results are our bottom line *Ko ngā huanga tino pai ā mātou whāinga mutunga*

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MINISTRY OF EDUCATION
TE TĀHURU O TE MĀTAURANGA

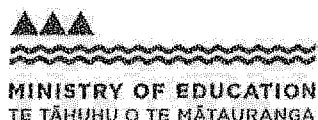
Boarding Programs

Program	Number of students									
	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Boarding Bursary	2,715	2,640	2,676	2,416	2,200	2,080	1,393	866	472	189
Mapihi Pounamu (MES Rad)							304	182	91	30
Boarding Allowances (MES Rad)							679	1,161	1,435	1,695

The data is live and therefore subject to change. It was extracted on 9th of May 2018 and includes incidences recorded up to this date.

HA

Information disclosed in accordance with the Official Information Act 1982



MEMO

To: David Wales, National Director Learning Support.
From: Jennifer Lowe, Senior Advisor Provider Services.
Cc: Jason Ragg, Manager Provider Services. *JR*
 Megan Reid, Group Manager Service Delivery.
Date: 23 May 2018.
Subject: 2017 Boarding Allowance review.

Purpose of this memo

1. To provide you with back-pocket information about the 2017 boarding allowance review.

Current boarding allowances and payments

Allowance / payment	Description	Amount
Multiple Barriers hostel allowance	Aimed at students facing multiple challenges to access education in the areas of participation, relationships, behaviour, achievement, and environment. Students opt for board in a school hostel.	\$7,500
Multiple Barriers private board	As above but students opt for private board.	\$4,000
Multiple Barriers pastoral care	For students receiving the multiple barriers allowance which is paid directly to schools.	\$500
Access allowance	Aimed at students with the sole barrier being the distance they live from their nearest secondary school	\$3,200
Access travel payment – Great Barrier Island (GBI)	Approximate cost for 4 return trips for each student per year. Paid directly to GBI families and can be used at their discretion	\$920
Access travel payment – Pitt Island and Chatham Islands	Actual cost for 4 return trips per year for all students on these islands. Paid by the Ministry directly to transport provider(s).	\$400,000 (approx)

Boarding allowance budget and current cost of boarding allowances

2. The current budget for the boarding allowance scheme is \$11.319m. Boarding allowances are a standalone appropriation and any underspend cannot be carried over and must be returned to Treasury. This occurs as part of the supplementary estimates (SUPPs) process around May/June and is managed by Finance.
3. At the time the boarding allowance review and financial modelling was being completed 2016/17 was the financial year in question, and there was a \$1.946m underspend. The budget underspend in the Boarding Allowance scheme allows for fluctuations in numbers and future growth of student numbers.¹

¹ Updated information for the 2017/18 financial year is that there was a \$2.3m underspend. \$900k is to be transferred to the home schooling budget and \$1.1m is to be returned to Treasury.

Numbers / student growth

4. The number of students in the Boarding Allowances scheme can fluctuate between school terms but the trend since 2014 is that numbers have increased by year.² Numbers in the Boarding Bursary and Māpihi Pounamu schemes, which were replaced by Boarding Allowances in 2014, are decreasing and no new students are being admitted into either of these schemes.

Allowance / Scheme	Student numbers			
	2014	2015	2016	2017
Boarding Bursary	1,393	866	472	189
Māpihi Pounamu	304	182	91	30
Boarding Allowances*	679	1,161	1,435	1,695

*includes Multiple Barriers and Access allowances

Boarding allowance review

5. An internal review of boarding allowances was completed by the Service Support team in May 2017. The review included feedback from scheme participants. The introduction of the Boarding Allowance scheme in 2014 contained a requirement for a three-yearly review.

Scope of review

6. The Boarding Allowance review had an improvement focus. It considered whether the value of allowances and associated payments were still appropriate and whether the thresholds used to determine eligibility for support were at the right level. Policy foundations for boarding allowances were assessed as being current and were not reviewed.³

s 9(2)(g)(i) OIA

Review recommendations

9. The proposed increase to the value of boarding allowances and payments was as follows:

Allowance / Payment	Current value	Boarding allowance review recommendation
Access boarding allowance	\$3,200	
Access travel payment – Great Barrier Island (GBI)	\$920 (approx. 4 return trips)	

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² Reasons for numbers to fluctuate between school terms include students entering and exiting the boarding allowances scheme, and moving between allowances i.e., between hostel board and private board in the Multiple Barriers scheme.

³ The policy foundation of Boarding Allowances aims to help students who ordinarily face significant barriers to access appropriate education, to achieve NCEA Level 2 or equivalent by age 18. The policy is focussed on delivering a higher level of support to students in greatest need. The funding provided by the Ministry is a contribution towards the cost of boarding away from home and will not usually cover the entire cost of boarding at a particular school.

Allowance / Payment	Current value	Boarding allowance review recommendation
Access travel payment – Chatham Islands / Pitt Island	Actual and reasonable costs of 4 return trips	
Multiple Barriers hostel boarding allowance	\$7,500	
Multiple Barriers private boarding allowance	\$4,000	
Multiple Barriers – pastoral care payment to schools	\$500	

Cost of the options in the financial modelling

11. The cost of three options were modelled on student numbers in the boarding allowance scheme from July 2017. The options were all combinations of the proposed changes from the review, and an option that included a variation which became the final option. The value of allowances and payments in the final option, and the reasons for the changes, are set out in the following table.

Current value	Review recommendation	Final option	Reason for change from review recommendation
Access allowance \$3,200			
Access travel pay \$920			
Access travel pay \$400,000			
Multiple Barriers h \$7,500			

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Multiple Barriers private board	
\$4,000	
Multiple Barriers pastoral care	
\$500	

12. The table in Annex 1 sets out student numbers in July 2017 and the different options considered in the financial modelling. Note this table does not include student growth.



17. A cap on student numbers receiving boarding allowances was not considered as an option in the boarding allowance review or financial modelling as it would mean students being excluded from accessing education.

Next steps

18. There will be an internal review of boarding allowances in 2020 in line with the three-year review cycle.

s 9(2)(g)(i) OIA

Annex 1 Boarding allowance funding proposal showing initial three options in the financial modelling (does not include student growth)

Allowance	Current Rates	Student Numbers 20 July 2017	Current Total Cost
Access Boarding Allowance	3,200.00	769	2,460,800.00
Access travel payment - Pitt Island and Chatham Island	400,000.00		400,000.00
	Approx annual cost for 4 return trips/ students/year		
Access travel payment Great Barrier Island	920.00	25	23,000.00
Multiple Barrier Boarding Hostel	7,500.00	783	5,872,500.00
Multiple Barrier Private Board Allowance	4000	50	200,000.00
Multiple Barrier Pastoral Care Payment	500.00	833	416,500.00
		Total	9,372,800.00
		Budget	11,319,000.00
		Variance	1,946,200.00

s 9(2)(g)(i) OIA

s 9(2)(g)(i) OIA

Annex 2 Final option for 2017/18 and outyears to 2021/22 including student growth

Final option for 17/18 and outyears to 21/22							
Growth	Student Numbers 20 July 2017	2017/18	Student Growth				2021/22
			2018/19	2019/20	2020/21	2021/22	
			5%	6%	7%	8%	
Access Boarding Allowance	769	3,076,000.00	3,229,800.00	3,260,560.00	3,291,320.00	3,322,080.00	
Access travel payment - Pitt Island and Chatham Island* not driven by student		400,000.00	400,000.00	400,000.00	400,000.00	400,000.00	
Access travel payment Great Barrier Island	25	37,500.00	39,375.00	39,750.00	40,125.00	40,500.00	
Multiple Barrier Boarding Hostel	783	6,655,500.00	6,988,275.00	7,054,830.00	7,121,385.00	7,187,940.00	
Multiple Barrier Private Board Allowance	50	200,000.00	210,000.00	212,000.00	214,000.00	216,000.00	
Multiple Barrier Pastoral Care Payment	833	416,500.00	437,325.00	441,490.00	445,655.00	449,820.00	
Total Projected Spend		10,785,500.00	11,304,775.00	11,408,630.00	11,512,485.00	11,616,340.00	
Total Budget		11,319,000.00	11,319,000.00	11,319,000.00	11,319,000.00	11,319,000.00	
Under/Over		533,500.00	14,225.00	89,630.00	193,485.00	297,340.00	

Alan Ryan

From: Jennifer Lowe
Sent: Friday, 15 June 2018 10:50 AM
To: ELSA Mailbox
Cc: Jason Ragg; Jason Amayun; Kate Ford; Ministerial Requests
Subject: Meeting with Rural Women NZ
Attachments: Info for meeting with Rural Women NZ - Final.docx

Categories: Saved in FileNet

Hi,

With regard to Minister Martin's meeting with Rural Women of NZ on 27 June, please find attached information about boarding allowances.

This information has been signed off by David Wales.

Ngā mihi,
 Jennifer

Jennifer Lowe | Senior Adviser | Provider Services, Learning Support
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 33 Bowen St, Wellington

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We get the job done *Ka oti i a mātou ngā mahi*

We are respectful, we listen, we learn *He rōpū manaaki, he rōpū whakarongo, he rōpū ako mātou*

We back ourselves and others to win *Ka manawanui ki a mātou, me etahi ake kia wikaoria*

We work together for maximum impact *Ka mahi ngātahi mā te tūkinga nui tonu*

Great results are our bottom line *Ko ngā huanga tino pai ā mātou whāinga mutunga*



MINISTRY OF EDUCATION
 TE TĀHURU O TE MĀTAURANGA

Minister's Martin's meeting with Rural Women NZ, 27 June 2018

Information about boarding allowances

Background about the introduction of the Boarding Allowance scheme

The Boarding Allowance scheme was introduced in 2014. It combined features of the former Boarding Bursaries and Māpihi Pounamu schemes but also introduced new policy and criteria. Boarding Bursaries supported children who needed to live away from home to attend school due to distance or availability of subjects. Māpihi Pounamu supported children who needed to live away from because they faced barriers to learning or were at risk.

Available allowances in the Boarding Allowance scheme

There are two allowances within the boarding allowance scheme: the Multiple Barriers allowance and the Access allowance. The Multiple Barriers allowance is aimed at children facing multiple barriers to access education in areas such as behaviour, environment, educational achievement, participation, and relationships. The Access allowance is aimed at children with the sole barrier being the distance they live from their nearest secondary school. A child is eligible for this allowance if they live too far away from an appropriate school and the Ministry's school transport assistance programme does not provide a solution. "Too far away" is defined as:

- The closest school transport service is an unreasonable distance, for example, 20km or more away.
- The child has to travel longer than 60 minutes one way to their nearest school each day.
- The child has to travel an unreasonable distance to the nearest school, for example, 60km or more.

Outcome of the 2017 boarding allowance review

In 2017 the Ministry of Education undertook a review of Boarding Allowances, the outcome of which was that boarding allowances and payments could not be increased. The review recognised that the costs associated with boarding have increased. While the Ministry acknowledges this is challenging for many families, there are many important spending priorities within the education sector, and the Ministry must operate within the annual Boarding Allowance budget.

There were no changes to the eligibility criteria. Applications that meet the approval criteria will be approved.

Boarding allowances will not usually cover the full cost of boarding

For all children receiving allowances, the funding provided by the Ministry is a contribution towards the cost of boarding away from home and will not usually cover the entire cost of boarding at a particular school.

The current value of the Multiple Barriers allowance is \$7,500 per child per year for hostel board, or \$4,000 per child per year for private board.¹ The current value of the Access allowance is \$3,200 per child per year.²

The Multiple Barriers allowance pays more than the Access allowance

The greater value of the Multiple Barriers allowance is based in the policy foundation of the Boarding Allowances scheme which prioritises support for children in greatest need.

¹ Children receiving the Multiple Barriers allowance are also eligible for a \$500 pastoral care payment which is paid directly to the school they attend.

² Children receiving the Access allowance who live on Chatham Islands, Pitt Island, and Great Barrier Island are also eligible for a travel payment for four return trips per year. For children living on Chatham Islands and Pitt Island the actual cost is paid by the Ministry directly to the transport provider(s). For children living on Great Barrier Island \$920 is paid directly to the families and can be used at their discretion.

Increases to the distance-based allowance

The introduction of the Boarding Allowance scheme in 2014 resulted in an increase in the allowance paid to almost all children receiving an allowance for distance reasons. The Boarding Bursaries annual allowance was \$2,725 per child, while the annual value of the Access allowance was set at \$3,200 per child.

Support for children in rural communities who face significant barriers to attend school

Children who face significant barriers to attend school can apply for the Multiple Barriers boarding allowance. Applicants for the Multiple Barriers allowance need to demonstrate they face barriers to educational achievement in the areas of participation, relationships, behaviour, achievement, and environment.

If the cost of boarding school is financially unsustainable for a family and there is either no local schooling option or it is considered unsuitable, another option could be to enrol in Te Aho o Te Kura Pounamu (Te Kura – The Correspondence School). Te Kura provides state-funded distance education from early childhood to NCEA Level 3. While the curriculum is mostly delivered online, students are provided with individual support with a learning advisor, qualified subject teachers, and access to advisories in many regions at which students can talk to teachers and meet other students.

Boarding Allowances are reviewed every three years

Boarding allowances will be reviewed again in 2020.

Boarding Hostels and Boarding Allowances

- The Ministry of Education funds two types of Boarding Allowances –
 - Access Barriers – for students who face barriers because they live at a distance from their nearest school. The value of their funding is \$3,200 per year.
 - Multiple Barriers – for students who are at risk of not achieving in education because of other barriers in their lives. They are assessed on the barriers they face in terms of participation, relationships, behaviour, achievement and environment. The value of their funding is \$8,000 per year.
- Students also have the option of private boarding, which is arranged by the family. We pay at the same rate as for hostels for access barrier students, and \$4,500 per year for students facing multiple barriers.
- More details about Boarding Allowances can be found here: <https://parents.education.govt.nz/secondary-school/your-child-at-school/boarding-allowances/>
- The Ministry of Education licences boarding hostels. Most of them are on the site of a school or associated with a school, but they don't have to be. Some are separate. s 9(2)(a) OIA
- The closest parallel to what [REDACTED] is proposing is the In-Zone organisation in Mt Eden. They have set up a boys' hostel from which the students attend Auckland Grammar School, and a girls' hostel whose students go to Epsom Girls' Grammar School. (A documentary about this organisation is about to go to air).
- It seems that the students come under the legal guardianship of the hostel manager and are therefore eligible as "in-zone" students as they live with their guardian within the zones of those schools.
- There are currently 19 boys at the Auckland Grammar In-Zone hostel funded by the Ministry's Boarding Allowance scheme, and 8 girls at the Epsom Girls' Grammar In-Zone hostel. There will be other students there as well, but that is the number who are eligible for Boarding Allowance funding.
- These students are funded because they are eligible in their own right, not because they are living in this hostel

- [REDACTED] may be proposing something similar, where students live in a hostel and receive mentoring support, and attend local secondary schools which this residential address enables them to attend.
- If the students were assessed as eligible for a Boarding Allowance, they could be funded to attend a proposed hostel, if it were licensed. But the student eligibility for the Boarding Allowance is not automatic – it would depend on their individual circumstances. Acceptance into a particular hostel is not a rubber stamp for a Boarding Allowance.

Information requests from Education and Workforce hearing for Vote Education

Question 27. Provide information on boarding allowances including whether they are underspent, and the basis on which they are allocated (in particular, do children living in rural areas "more than 20km away from the nearest bus stop" receive less than children living closer to their schools).

There are two allowances within the boarding allowance scheme: the Multiple Barriers allowance and the Access allowance. The Multiple Barriers allowance is aimed at children facing multiple barriers to access education in areas such as behaviour, environment, educational achievement, participation, and relationships. The Access allowance is aimed at students with the sole barrier being the distance they live from their nearest secondary school. A child is eligible for this allowance if they live too far away from an appropriate school and the Ministry's school transport assistance programme does not provide a solution. "Too far away" is defined as:

- The closest school transport service is an unreasonable distance, for example, 20km or more away.
- The child has to travel longer than 60 minutes one way to their nearest school each day.
- The child has to travel an unreasonable distance to the nearest school, for example, 60km or more.

The current value of the Multiple Barriers allowance is \$7,500 per child per year for hostel board, or \$4,000 per child per year for private board.¹ The current value of the Access allowance is \$3,200 per child per year.² For all children receiving allowances, the funding provided by the Ministry is a contribution towards the cost of boarding away from home and will not usually cover the entire cost of boarding.

The Multiple Barriers allowance pays more for boarding away from home than the Access allowance. The greater value of the Multiple Barriers allowance is based in the policy foundation of the Boarding Allowances scheme which prioritises support for students in greatest need. As the Access allowance has a distance-based criteria, children receiving this allowance are more likely to live further away from their school. However, children from small towns and rural areas (who live further away from their school), also receive the higher value Multiple Barriers allowance, although that is because they meet different criteria. Information on the application process and criteria for boarding allowances is available on the Ministry website: parents.education.govt.nz/secondary-school/your-child-at-school/boarding-allowances/.

There was a \$1.100m underspend in the Boarding Allowances appropriation in the 2017/18 financial year. The appropriation was initially set at \$11.319m. The reason for the underspend is that fewer families than were forecast and budgeted for have applied for an allowance during 2017/18. The underspend has been reprioritised to help address cost pressures in other votes, including Vote Education. The funding will be returned to the Crown on 30 June 2018.

Families will not miss out on an allowance due to the underspend being given up. The Ministry will continue to assess each application on its merits. There are no changes to the two boarding allowances available and no changes to the eligibility criteria. Applications that meet the approval criteria will be approved.

¹ Children receiving the Multiple Barriers allowance are also eligible for a \$500 pastoral care payment which is paid directly to the school they attend.

² Children receiving the Access allowance who live on Chatham Islands, Pitt Island, and Great Barrier Island are also eligible for a travel payment for four return trips per year. For children living on Chatham Islands and Pitt Island the actual cost is paid by the Ministry directly to the transport provider(s). For children living on Great Barrier Island \$920 is paid directly to the families and can be used at their discretion.