

SDR 234/2011

14 December 2011

## Education Maintenance Allowances awarded in Wales – update at end of November 2011

This monthly Statistical First Release presents information on the number of Education Maintenance Allowances (EMAs) awarded to students in further education in academic year 2011/12, as at the end of November 2011. The release is based on data provided by the Student Loans Company (SLC) and is correct as at 5 December 2011.

The EMA Wales scheme was introduced for 16 year olds in 2004/05 and extended to include 17 year olds in 2005/06 and finally to include 18 year olds in 2006/07. EMA is a weekly allowance, linked to satisfactory attendance, paid fortnightly to eligible students attending learning centres in Wales.

From academic year 2011/12, the criteria for new EMA students receiving the £30 award has changed, and the £10 and the £20 awards are no longer available. Students new to EMA may qualify for an award of £30 per week, depending on household income and family circumstances. Students who received EMA in 2010/11 who are returning to education and meet the same eligibility criteria as for 2010/11 will continue to get their EMA, be it for £10, £20 or £30 per week. No further bonus payments (previously paid in September, January and July) will be made to any students.

### Key results

As at 30 November 2011, approved applications were down 9 per cent on last year, whilst the total number of applications received was down by 10 per cent (*Charts 1 and 2*). As a result of some of the policy changes mentioned above, i.e. the removal of the £10 and £20 awards for students new to EMA in 2011/12, fewer students are eligible for this support. There are also fewer students awarded the £30 award compared with last year. However, this is the first monthly data point available for applications for 2011/12, and it is too early to predict whether the percentage decreases seen this month will apply to final data.

- A total of 33,760 EMA Wales applications had been received for the academic year 2011/12 (*Table 1*).
- 31,840 (94 per cent) of applications received were approved, 605 (2 per cent) were rejected and 1,265 (4 per cent) were incomplete (*Chart 3, Table 1*).

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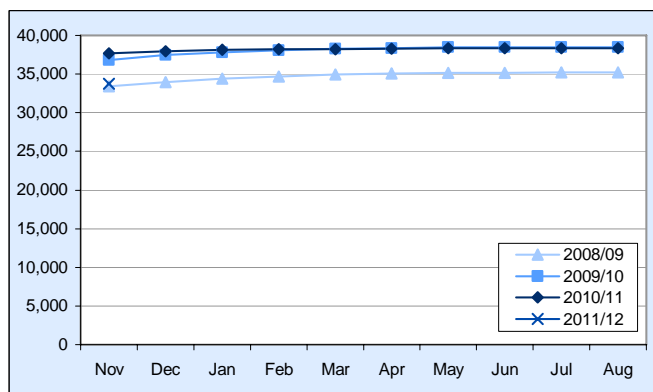
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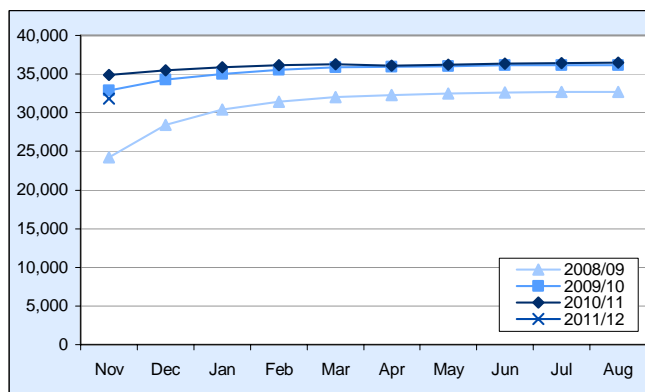


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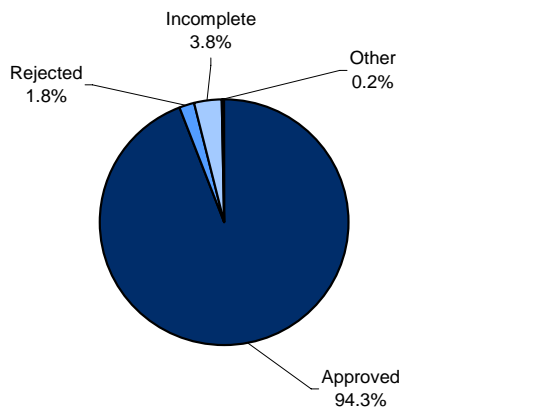
**Chart 1: Cumulative number of all EMA applications received, by month and year of study**



**Chart 2: Cumulative number of approved EMA applications, by month and year of study**



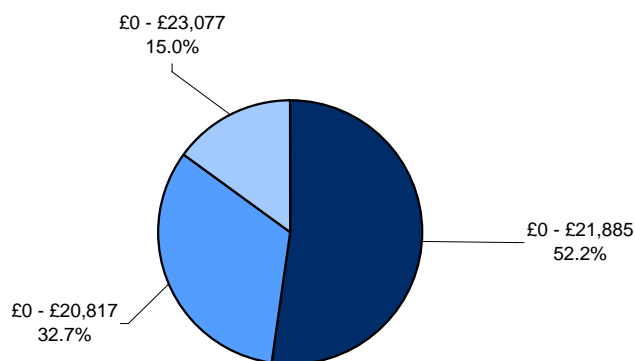
**Chart 3: Total applications received by current work stage for academic year 2011/12, as at 30 November 2011 (a)**



(a) Current work stage denotes the status of the application at 5 December 2011, when the data was extracted from SLC's database.

As at 30 November 2011, 94 per cent of EMA applications received had been approved and 2 per cent had been rejected (Chart 3, Table 1). The majority of the remaining applications received were incomplete. These are applications that are either "missing information" (e.g. no date of birth included) or "missing evidence" (e.g. no birth certificate attached).

**Chart 4: Approved applications, by EMA £30 award and threshold levels, as at 30 November 2011 (b)**



(b) Current work stage denotes the status of the application at 5 December 2011, when the data was extracted from SLC's database.

As at 30 November 2011, £30 awards accounted for 92 per cent of all approved applications, with £20 awards accounting for 5 per cent and £10 awards accounting for 3 per cent (Chart 4, Table 2).

Of those entitled to a £30 award, 52 per cent of approved applications were from returning students with a household threshold income of £21,885 or less; 33 per cent were from new claimants with a household income of £20,817 or less (independent students/only child in household), and the remaining 15 per cent were from new claimants with a household income of £23,077 or less (with siblings aged 16 or under in the household / one or more siblings aged 20 or under in full-time education or training and eligible for child benefit in the household) (Chart 4).

**Table 1: Applications by workstage, as at 30 November 2011**



| <b>Current work stage</b> | 2006/07       | 2007/08       | 2008/09       | 2009/10       | 2010/11       | 2011/12       |
|---------------------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Approved                  | 24,345        | 27,185        | 24,255        | 32,910        | 34,860        | 31,840        |
| Rejected                  | 555           | 665           | 550           | 745           | 515           | 605           |
| Incomplete (a)            | 5,835         | 3,585         | 7,620         | 2,835         | 2,155         | 1,265         |
| Other (b)                 | 360           | 550           | 995           | 330           | 120           | 50            |
| <b>Total</b>              | <b>31,095</b> | <b>31,990</b> | <b>33,420</b> | <b>36,815</b> | <b>37,655</b> | <b>33,760</b> |

Source: Student Loans Company

(a) These are applications that are either "missing information" (e.g. no date of birth included) or "missing evidence" (e.g. no birth certificate attached).

(b) These are applications that are in one of the following workstages (as defined by SLC): assessed; awaiting rejection; data capture incomplete; failed assessment; validated; verified.

**Table 2: Approved applications for academic year 2011/12 by learning centre type, gender and value of EMA award, as at 30 November 2011**

|                                   | £30           | £20          | £10          | Total         |
|-----------------------------------|---------------|--------------|--------------|---------------|
| <b>Further Education College:</b> | <b>18,115</b> | <b>565</b>   | <b>565</b>   | <b>19,595</b> |
| Males                             | 8,770         | 455          | 265          | 9,485         |
| Females                           | 9,350         | 460          | 300          | 10,110        |
| <b>Secondary School:</b>          | <b>10,375</b> | <b>685</b>   | <b>495</b>   | <b>11,560</b> |
| Males                             | 4,700         | 295          | 225          | 5,220         |
| Females                           | 5,680         | 395          | 270          | 6,340         |
| <b>Other Learning Centre:</b>     | <b>645</b>    | <b>25</b>    | <b>15</b>    | <b>685</b>    |
| Males                             | 380           | 10           | 10           | 400           |
| Females                           | 265           | 10           | 10           | 285           |
| <b>All Learning Centres:</b>      | <b>29,140</b> | <b>1,625</b> | <b>1,075</b> | <b>31,840</b> |
| Males                             | 13,845        | 495          | 495          | 15,105        |
| Females                           | 15,290        | 580          | 580          | 16,735        |

Source: Student Loans Company

## Annex 1: Notes

### 1. Context

#### 1.1 Policy/operational context

EMA (Education Maintenance Allowance) is a scheme providing young people who wish to continue in education after school leaving age with an incentive to earn awards through good attendance and achieving agreed objectives. Changes to this scheme were introduced from September 2011, further details are provided here: <http://wales.gov.uk/docs/dcells/publications/101109emaen.pdf>

These monthly releases aim to provide high level operational updates on the EMA application process.

#### 1.2 Eligibility criteria, 2011/12

A student has a general entitlement to receive an EMA if:

##### *Student criteria*

- He/she is aged 16, 17 or 18 years old<sup>1</sup> on 31 August 2011.
- He/she has a bank or building society current account.
- He/she meets the nationality/residency criteria.

##### *Course criteria*

- He/she is studying full-time at a school ;or studying at least 12 guided hours a week at a recognised further education institution.
- He/she is studying an academic or vocational course up to and including level 3. Eligible academic or vocational course include GCSEs, A-Levels, BTECs, NVQs, GNVQs and Basic Skills courses.
- He/she is studying an eligible course that lasts at least 10 weeks.

##### *Household income criteria*

Evidence of household income in the prior tax year determines whether a student will be eligible for an EMA.

Students new to EMA in 2011/12 may qualify for an award of £30 per week. There are two different household income thresholds, which are based on the student's family circumstances. Students will not be able to receive EMA if their household income is above the threshold levels.

##### For students new to EMA in 2011/12

| Family circumstances  | Household income threshold |
|---|----------------------------|
| You are the only dependant child in the household   | £0 - £20,817               |
| You have one or more dependants aged 16 or under in the household   | £0 - £23,077               |
| You have one or more dependants aged 20 or under in full-time education or training and eligible for child benefit in the household | £0 - £23,077               |

Returning EMA students who continue to meet the eligibility criteria for 2010/11 EMA scheme, will continue to get their EMA, be it for £10, £20 or £30 per week.

##### Returning EMA students in 2011/12

| Household Income (per annum) | Entitlement Amount (per week) |
|------------------------------|-------------------------------|
| £0 - £21,885                 | £30                           |
| £21,886 - £26,840            | £20                           |
| £26,841 - £32,400            | £10                           |
| £32,401 or above             | Nil                           |

### 2. Data source

EMA applications and payments are administered by the Student Loans Company (SLC). Data held on EMA students is entered by SLC staff onto an administrative database for the purpose of assessing and paying EMA to students. This data is also stored in a management information data warehouse for the purpose of management reporting, operational performance reporting, audit of processes, statistics,

<sup>1</sup> Entitlement may be extended to 19 year olds if they have not already received 3 years of EMA.

future policy planning and forecasting. Further details of SLC's administrative sources will be published on [SLC's web page](#) later this year. Processes and systems which enable customer and application assessment data to be held electronically are subject to periodic audit and integrity checks. SLC Internal Audit ensure that the processes governing data entry and application assessment are adhered to. Data integrity validation rules are used to identify and correct errors in data. Management Information extracted from SLC systems are subject to quality assurances prior to distribution.

The data in this release were collected via the SLC management information system and were extracted on 5 December 2011. All information is based on applications received by 30 November 2011.

### **3. Definitions**

#### **3.1 Change in applicant circumstances**

The data represented in this release refer to applicants' most recent learning agreement. Therefore if an applicant has attended more than one type of learning centre or has received different values of weekly payments, to avoid double-counting, they are only included under their most recent status.

#### **4. Rounding strategy**

Figures in this release have been rounded to the nearest 5. Due to rounding, the sums of some rows or columns may not add to the total figure given. Numbers less than 5, but not zero, are represented by '\*'.

### **5. Key Quality Information**

This section provides a summary of information on this output against five dimensions of quality: Relevance, Accuracy, Timeliness and Punctuality, Accessibility and Clarity, and Comparability.

#### **5.1 Relevance**

The statistics are used both within and outside the Welsh Government to monitor educational trends and as a baseline for further analysis of the underlying data. Some of the key users are:

- Ministers and the Members Research Service in the National Assembly for Wales;
- Officials in the Welsh Government;
- Other government departments;
- Further Education Institutions, Work-Based Learning providers, schools and local authorities;
- Wales Audit Office;
- Students, researchers, academics and universities;
- Individual citizens, private companies, and the media.

These statistics are used in a variety of ways. Some examples of these are:

- advice to Ministers;
- to inform and evaluate the education policy-making process in Wales;
- to forecast future expenditure of student support schemes in Wales.

#### **5.2 Accuracy**

Statisticians within the Welsh Government review the data and query any anomalies with the Student Loans Company before tables are published. The updated monthly figures for the current academic year are correct at the time of publication. They are subject to revisions following further SLC processing, for example due to applications being re-classified from EMA to "Pathways to Apprenticeships" or vice versa. See "Further Information" for more details.

#### **5.3 Timeliness and Punctuality**

For 2011/12 this is the first monthly publication on the number of EMA applications and relates to applications up until the end of November 2011. Monthly updates during a given academic year relate to data from the end of November each month until the end of July and are published as soon as possible, a few weeks following the end of a given month, and according to a planned and pre-announced series of publication dates. Final data for 2011/12 will be published in September 2012, and the final publication will include more detailed data tables.

#### **5.4 Accessibility and Clarity**

This statistical release is pre-announced and then published on the Statistics section of the Welsh Government website. It is accompanied by more detailed tables on StatsWales, a free to use service that allows visitors to view, manipulate, create and download data.

### **5.5 Comparability**

For the academic year 2004/05 only students aged 16 at the start of the academic year were eligible to receive an EMA. The scheme was extended to 17 year olds for the 2005/06 academic year and finally 18 year olds in 2006/07. Therefore comparability between years varies, and before 2006/07 should be restricted to comparisons. Figures from 2006/07 onwards are comparable with each other.

The data used for the cumulative number of EMA Wales applications as reported on the StatsWales website are now taken from the SLC via their management information system, which are based on the same definitions used for the September Statistical First Release, which was not the case in years prior to 2009/10.

Data for 2010/11 will only be comparable with previous years' data from November onwards. This is due to a change in the Student Loans Company's procedure for renewing applications for existing students who received an Education Maintenance Allowance (EMA) during the academic year 2009/10.

From academic year 2011/12, students new to EMA can qualify for an award of £30 per week, depending on household income. Students who received EMA in 2010/11 who are returning to education and meet the same eligibility criteria as for 2010/11 will continue to get their EMA, be it for £10, £20 or £30 per week. No further bonus payments (previously paid in September, January and July) will be made to any students.

Northern Ireland and Scotland have their own EMA schemes. EMA closed to new applicants in England from 1 January 2011.

### **6. Further Information**

Updates providing the number of EMA applications during 2011/12 will be published monthly, and will be found on the [Statistics for Wales](#) website.

Comparable monthly data for previous academic years (similar to Table 1 of this Release) can be found in [StatsWales table 013283](#) (please note that previous months' data for 2011/12 are subject to change - see "Revisions Policy" - and should be treated as provisional until final figures are published in September 2012). Please note that monthly 2009/10 data are confirmed as final (as at 31 August 2010) in [StatsWales table 013283](#), and will therefore differ slightly to what is seen in Table 1 of this Release, as these figures were those correct as at 31 July 2010.

Further detailed information on EMA applications prior to academic year 2010/11 (similar to Table 2 of this Release) can be found in [StatsWales table 002480](#). This will be updated with final 2010/11 data in September 2011.

The final EMA Statistical First Release for academic year 2010/11 was published in September 2011. The provisional Statistical First Release, which has previously been published in January, has been discontinued due to the more detailed data now being published within this monthly release. Please contact us if you have further queries on the data published.

Further information about the EMA scheme can be found at [www.StudentFinanceWales.co.uk](http://www.StudentFinanceWales.co.uk).

### **Related articles**

The final EMA Statistical First Release for academic year 2010/11 is available via the following link: <http://wales.gov.uk/topics/statistics/headlines/post16education2011/110922/?lang=en>

The Scottish Government publish statistics on recipients of EMA, for example in the following link: <http://www.scotland.gov.uk/Publications/2010/12/14095349/0>

Statistical Releases on other strands of student support in Wales are available via the following link: <http://wales.gov.uk/topics/statistics/theme/post16ed/student-finance/?lang=en>