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ABSTRACT

The Education Maintenance Allowance (EMA) program was developed and offered in 3-year pilot projects that were designed to test whether extra funds would encourage more of England's young people from low-income families to participate in full-time education and training, stay on course for the duration of the program, and achieve their qualification aim. The EMA program's effectiveness was examined in an impact study of EMA recipients at six schools and further education (FE) colleges. Data were collected through questionnaires to program coordinators at each institution, follow-up telephone interviews with the program coordinators, and a site visit to one of the FE colleges. An update questionnaire was also e-mailed to institutions examined in the previous year's pilot study. All the institutions welcomed the EMA's introduction as a way of improving retention, and its positive effects on retention were already beginning to be evident at the time of the study. However, evidence of the EMA's impact on achievement was emerging only slowly. Several concerns regarding the EMA were raised, including concerns that the EMA increases institutions' administrative workload and may result in a reduction in learner support funds. However, the EMA appears to have assisted well-qualified students to enter FE and may have encouraged recipients to remain in school. (MN)

LSDA reports

The impact of Education Maintenance Allowances

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Contents

Summary	1
Introduction	2
Background	2
Research aims	2
Methodology	2
Administration of the scheme	3
Planning and publicity	3
Application process	3
Eligibility and entitlement	3
Learning agreements and conditions	4
LEA returns	5
Monitoring	5
Staff development	6
The 2-year restriction	7
Equity of funding and Access funds	7
Bonus payments	8
Transport EMA	9
Key points	9
The impact of the scheme	10
Enrolments	10
Retention and achievement	11
Key points	12
The impact of EMAs on work-based learning	13
Key points	14
Implications	15
For schools and colleges	15
For LEAs	16
For the DfES	17
References	18
About the authors	18
Acknowledgements	18

Summary

The 3-year Education Maintenance Allowance (EMA) pilots were designed to test whether extra funds would encourage more young people from low-income families to participate in full-time education and training, to stay on-course for the duration of the programme, and to achieve their qualification aim.

This research on the EMA scheme's impact, designed to complement a wider DfES study (Legard *et al.* 2001), was carried out in 2001. It updates the previous year's survey of institutions in Phase 1 pilot areas (Fletcher 2000). Six schools and colleges in Phase 2 areas were also surveyed in 2001.

The study found that the pilot colleges and schools welcome the introduction of the EMA. Staff believe it will have a significant effect on retention, and it appears that retention is already improving. However, evidence of improved achievement is emerging only slowly. This needs to be monitored carefully.

Institutions enrolling EMA students for the first time should expect an increased administrative workload, which will be substantially greater than administering Learner Support Funds for a similar number of students. Both local education authorities (LEAs) and the DfES could initiate actions to help ease the burden on institutions and smooth the eventual introduction of EMAs across England – and perhaps further afield.

The main areas of concern are the:

- rule that requires means-testing on the basis of parental (rather than household) income
- definition of terms such as 'authorised absence'
- conditions applicable for the payment of the achievement bonus
- restriction of EMA entitlement to 2 years only
- possible reduction in Learner Support Funds
- cost to schools and colleges of administering the scheme.

Individualised Student Record (ISR) data on the introduction of the EMA for 16 year olds indicates that:

- over 20% of students in the pilot areas have received an allowance
- a slightly higher proportion of girls than boys are receiving EMAs
- it has assisted well-qualified students to enter further education
- it may have encouraged recipients to remain at college
- recipients are aiming at more qualifications, and at a higher level
- students do not have to be from Widening Participation (WP) uplift categories to receive it
- Black students may be under-represented as recipients.

There is no consistent pattern throughout England, but the introduction of the EMA may well have created a small step-change in the trend for Year 11 destinations. This trend shows a gradual increase in the proportion remaining in education and a corresponding decrease in the proportion of students entering the work-based training routes. Introduction of the allowance may have caused a small blip in a continuing trend, with a return to the original trend line in the second EMA year.

Introduction

Background

The Education Maintenance Allowance (EMA) scheme was planned by government as a 3-year pilot to test whether extra funds encouraged more young people from low-income families to participate in full-time education and training, to stay on-course for the duration of the programme, and to achieve their qualification aim.

In September 1999, the Phase 1 pilot was introduced in 15 local authority areas, with varied payment arrangements. An extension of the EMA pilot to 40 additional areas was announced in March 2000, to take effect from September 2000.

To be eligible, students needed to be aged 16–19, living in a pilot area, in Year 11 (Year 10 in 2000), and undertaking a full-time course leading to a qualification up to Level 3. Their parents' annual income had to be below £30,000. Recipients were required to complete a learning agreement, detailing their programme, agreed learning goals, homework and attendance requirements.

Each pilot scheme pays a weekly allowance, based on parental income (commonly up to £30). In four of the new areas, eligible young people receive actual transport costs. Bonuses (commonly £50) are paid to those with a full attendance record at the end of each term. If agreed learning goals are achieved, a further bonus is paid at the end of the course. In most areas, the allowance is paid to the student, but in two areas it is paid to the mother (or the person who receives the Child Benefit). Entitlement is for 2 years. Payments are stopped if the student breaks the learning agreement.

Research aims

The Learning and Skills Development Agency undertook the current research to obtain an early view of the EMA pilots, particularly from the provider's perspective. It complements the wider DfES study on the scheme's impact (Legard *et al.* 2001), and aims to highlight issues that educational institutions, local government and the DfES might consider in anticipation of national implementation of the allowances.

This report provides an update to our earlier study of the scheme's initial effects on Phase 1 pilot colleges (Fletcher 2000). The research was undertaken mostly during February and March 2001.

Methodology

A questionnaire to update information provided in 2000 was e-mailed to institutions in the Phase 1 pilot areas. A coordinator at each college or school circulated these to interested parties and compiled a response. A longer questionnaire, based on the one used in 2000, was sent to six schools and colleges in Phase 2 areas.

Follow-up telephone interviews were conducted, generally with the coordinator who compiled the return. One college was visited, to observe procedures. Telephone discussions on the effect of EMAs on work-based learning enrolments were also held with a sample of TECs, careers services and regional government offices.

The Learning and Skills Council provided statistical data based on college ISR returns.

Finally, a seminar was held with representatives from colleges, the DfES, the Learning and Skills Council (LSC), the Centre for Research in Social Policy at Loughborough University, and the National Centre for Social Research.

Administration of the scheme

Planning and publicity

A key concern emerging from the 2000 study (Fletcher 2000) was the need for impartial advice to pupils from all parties, including LEAs. Colleges also emphasised the importance of getting information to potential applicants as early as possible.

In the 2001 survey, many institutions reiterated the need for timely information to potential EMA applicants.

- New College Nottingham suggested that the LEA 'needs to bring forward the date of providing information to schools'.
- Leicester College called for 'more publicity to young people before they leave school'.
- NE Worcester College reported that 'many students had gone on exam leave' and never received the information.
- Lewisham College suggested targeting publicity at parents, as young people failed to appreciate the significance of the information.

Doubts still exist in colleges about the impartiality of advice given to potential applicants.

Application process

Participants in the first pilots had reported reluctance in some LEAs to give application forms to colleges and schools to hand out. Late applications and delays in processing had created administrative difficulties and likely barriers to participation. Early and wide distribution of forms was recommended, to maximise applications and ensure lists of recipients reach institutions at the beginning of the academic year.

In the second year, Phase 1 colleges continued to report delays in the approval process.

- At Oldham Sixth Form College, some students who enrolled in August 2000 were only getting EMA approval in March 2001. The same delay applied at Teesside, Gateshead, Lewisham and Cornwall.
- Nottingham noted that 'the delays were even greater than last year'.

Some institutions in the Phase 2 pilot areas highlighted similar delays. Some colleges attributed the delays to inefficiencies and inadequate staffing at the LEA, but Cornwall College reported that, in many cases, parents failed to return additional information requested. In contrast, NE Worcester College received the information from the LEA in March for students starting the following September – evidence that LEAs can operate efficiently.

Application forms were simpler and more readily available at some institutions than in the previous year.

- Lewisham College 'had a desk in our main enrolment hall where students were directed to find out about EMAs and ... pick up application forms'.
- The London boroughs were cooperating fully and accepting each other's application forms, which were identical apart from the logos used.
- Stoke-on-Trent College and New College Nottingham, however, called for better access to application forms.
- Taunton's College felt that paperwork could be simplified.

Eligibility and entitlement

During the first year, colleges found that some students were unaware of the EMA and others were confused about how the weekly figure was calculated. Colleges concluded that applications should be encouraged irrespective of family circumstances. Late decisions about eligibility created difficulties in managing applications for courses with high initial costs and in retrospective monitoring.

Concerns were raised about security implications for staff dealing with prospective applicants and parents, particularly in relation to means-testing, complaints about entitlement, and appeals against stopped payments.

The 'natural parent' rule

The 'natural parent' rule continued to cause great concern in 2001.

- Stoke-on-Trent College noted: 'It is definitely a barrier for a large number of young people from families where parents are separated/divorced. It would be far simpler if the means-testing was done either on the net income of the family unit of which the applicant was a member, or the lone parent with whom the young person was residing.'
- NE Worcester College contrasted the case of a single-parent family not receiving EMA because the absent father could not be traced, with that of a couple with one high-income partner (not the natural parent) where the child received the benefit.
- Cornwall College noted: 'Quite a lot of our previous EMA and new students are not now eligible for the allowance. This has caused quite a stir, as in a lot of cases the absent parent does not have contact with the student.'
- Oldham Sixth Form College agreed that the natural parent rule was causing 'hassle'.
- The City of Leicester School & Sixth Form Centre suggested that some students would be unfairly disadvantaged if a parent were made redundant in the current year, 'as claims are worked out on the previous year's income'.

Although some colleges reported that the DfES had listened carefully to their concerns on this point, there is no official indication of any change in policy.

Learning agreements and conditions

While the pilots had been successful in improving attendance, in 2000 some colleges reported pockets of non-achievement where students viewed mere attendance, which guarantees the weekly allowance, as sufficient. Colleges were considering how to use the required learning agreement constructively, perhaps to include criteria to influence retention and achievement.

In 2001:

- New College Nottingham reported that the LEA had modified the learning agreement, to emphasise achievement and observance of college rules
- Gateshead College included details of final student achievement, to make it easier to track for final bonus purposes
- King Edward VI School introduced the learning agreement for all sixth form students, not just EMA recipients, and echoed observations in the 2000 report (Fletcher 2000) that students not in receipt of EMAs 'are resentful'.

Definitions

The definitions of 'lateness' and 'attendance' remained contentious. The City of Leicester School & Sixth Form Centre, for example, required 95% of possible attendance and counted anything more than 1 or 2 minutes as lateness. Leicester College summarised: 'students have to arrive on time, behave well and complete the necessary work'.

At the seminar there was considerable debate about withholding payment for absence. There was a strong feeling that the purpose of the allowance was to encourage young people into further education, and staff should not use EMA stoppage as a form of punishment. Participants recommended treating three stoppages as a trigger for a local 'at risk' policy to look at the individual's problems. All participants considered it important that every aspect of the learning agreement should receive equal emphasis, and that students must be made aware of their right to appeal. Support mechanisms should be in place for students who struggle to comply. The level of EMA stoppages in a school or college is not evidence of raising standards.

LEA returns

Some LEAs in the initial pilots designed attendance forms, while others left it to individual colleges. It was generally felt that returns for all schools and colleges in an area should be standardised, and that all institutions should work to the same formula and requirements.

During the second year, the common arrangement continued to be that weekly returns needed to arrive at the LEA by 10am on the following Tuesday. Filing exception reports to LEAs on student absences, rather than complete attendance reports, was still common.

- Stoke-on-Trent College found this system simpler, but advised that there can be problems.
- Some colleges and LEAs dropped this practice because of problems the previous year.
- One college quoted an example of student absence missed from exception reports, leading to a £600 overpayment that cannot be recovered.
- Lewisham College now e-mails returns to a single LEA, which forwards them to the other LEAs using common software, greatly simplifying the college's workload.
- New College Nottingham provided the LEA returns two weeks in arrears, but found that tutors soon 'relaxed', leading to further time pressures. It does not recommend this system.

Monitoring

Monitoring of students' attendance, behaviour and achievement dominated the 2000 report (Fletcher 2000). Definitions of terms such as 'authorised absence' and 'lateness' caused many problems, regardless of the monitoring system used.

The cost of monitoring

Most colleges surveyed in 2000 used a *manual, paper-based registration system*. Colleges claimed that the DfEE had failed to appreciate the extent of the extra work. Some colleges had to employ extra staff to undertake the EMA monitoring, at an average cost of £24 per student per year.

Colleges with *electronic registration systems* appeared to have fewer problems, but electronic registration was not a 'magic bullet'. Swipe cards, for instance, were open to abuse. The extra costs, averaging £13 per student per year, were generally considered reasonable.

Timesheet systems placed increased responsibility on students, relieving the pressure on college staff. However, they were not without problems (such as forged signatures) during the first year and required stringent checks. Additional administrative support cost approximately £26 per student per year.

The cost of monitoring remained a major bone of contention in 2001.

- King Edward VI School 'would have appreciated some funding to cover additional workload pressures and training'. Their system worked well 'only because of the goodwill of clerical and teaching staff'.
- The City of Leicester School & Sixth Form Centre estimated an extra 6 hours per week for administrative staff plus 3 hours for the head of sixth. No funding was available to employ additional staff.
- Leicester College noted that monitoring activity was 'substantially detracting people from other areas of their work', but suggested that the 'workload is high because this is still a pilot year'. Additional paperwork for teaching staff was 'becoming a problem'.
- New College Nottingham estimated that, excluding tutor time, they would spend £55,000 on monitoring in 2002/03, substantially for EMA coordinators. They had to increase staff hours because, they said, the nature of EMA encourages students to try to 'fiddle the system'.
- Lewisham and Oldham Sixth Form have each doubled EMA administration staff. Oldham emphasised that 'this additional work is at the college's expense'.

In 2001, the Phase 1 pilot colleges increased EMA administrative staffing in line with the increase in EMA student numbers. In many cases, responsibilities were shared with staff administering the Learner Support Fund.

Monitoring systems

As institutions learned from earlier experiences, they altered their systems to minimise staff time spent on monitoring. Institutions without efficient electronic register systems appear to be changing over to some form of timesheet, which places the responsibility on the student.

- Gateshead College now asks students 'to get staff signatures on a timesheet which is handed in weekly'.
- Cornwall issues blank timetables to students in its sixth form centre; students complete these with their programme, and the tutor signs in the time slot.
- Lewisham has reduced staff time spent checking registers by having teaching staff confirm attendance by e-mail to the EMA coordinator.
- In Teesside Tertiary College's system (introduced by another college the previous year), students phoned in to notify an authorised absence and were given an authorisation code, which prevents later disputes.

Authorised absence

The definition of terms such as 'authorised absence' continued to generate strong feelings.

- Gateshead College pointed out that the definition of 'authorised absence' continued to cause problems – if parents kept signing a succession of letters authorising absence, some staff eventually stopped payments, while other staff did not. Gateshead College wanted hard-and-fast rules.
- Lewisham, too, expressed concern: 'There are no hard-and-fast rules re authorised absences and lateness. LEAs seem to say it is a college decision. Applying this in the London area means that many students have friends attending other colleges and they sometimes apply different rules.'
- NE Worcester College was clear that a student must be present for 100% of the guided learning hours, but 'illness, medical and dental appointments, interviews, funerals, breakdown of transport' were authorised absences.
- Other colleges and schools accepted only specialist hospital appointments as authorised.
- Taunton's College changed its procedure so that 'the form they sign to confirm their absence now has to be signed by either their parents or tutor'.

- Oldham, aware of numerous problems at a neighbouring college, set a limit of three letters signed by parents to authorise sick absences. Subsequent absences require a doctor's certificate.
- Teesside Tertiary College required a doctor's certificate after one week's sickness absence, but local GPs were becoming angry about the time it is taking to deal with the students. The college called for better guidelines on authorised absence.
- New College Nottingham stated that the attendance rules 'encourage students to make false claims of illness. Recent research indicates that this may be more widespread than suspected'. They believe students play the system with the connivance of their parents. There is also a problem with the validity of backdated medical certificates from doctors.
- Leicester College drew attention to the problem of retrospective register and absence checks for EMA students whose absences were notified to the college at a later date. The required Backdated Attendance Forms caused considerable additional work for both administrative and teaching staff.

Some colleges would welcome further guidance on definitions of authorised absence.

Staff development

The Phase 1 pilots found that strict monitoring of students was essential to the smooth operation of the allowance system. Some staff development on EMA implementation appeared necessary for all staff. Teaching staff with EMA students need to understand the significance of the definition of terms and the potential consequences of inadequate monitoring. Definitions of 'absences' and 'lateness' needed to be standardised across the college if some students were not to be penalised financially.

The follow-up study has found that these concerns applied equally to schools. Evidence after a year of operation reinforced the importance of staff development. Teesside Tertiary College noted 'greater awareness about the scheme amongst staff ... It is important that teaching staff, as well as support staff, can discuss the scheme with prospective students.'

The 2-year restriction

Concerns were expressed in the earlier study (Fletcher 2000) that EMAs failed to support lower-ability students throughout their full programme. The 2-year rule – based on school sixth forms and the standard A-level curriculum – was not appropriate for all FE students, many of whom start a foundation course and progress to intermediate level within the 2 years. EMAs would not be available to help these students progress to Level 3. A 3-year minimum period was considered desirable.

This restriction was still causing concern in 2001.

- Gateshead College considered using the Access fund to support students for 'a third year of study with us – if they still have the second year of a 2-year programme to do'.
- New College Nottingham reported 'considerable concern that the scheme is geared to the needs of advanced-level students and does not take into account the needs of students starting at a lower level, who may require 3 or 4 years to progress through the levels. This seems to contradict the stated aims of the EMA scheme.'
- Numerous Cornwall College students 'progressed from 1-year to 2-year programmes, which means their final year will be completely unfinanced'.
- At Teesside Tertiary College, 20 EMA students progressed to 2-year programmes and 'have already expressed concern about losing their allowance next year'.
- Stoke-on-Trent College also saw the 2-year rule as a major concern. Although they reported that DfES officials were aware of the issue, and recognised that a case might be made for an extra year for students with very low entry qualifications, there is no official indication of any change in policy.
- Oldham Sixth Form College expected 'uproar at the end of this year' unless the 2-year rule is changed.

Debate at the EMA seminar focused on the definition of 'vulnerable groups' who might be entitled to a 3-year allowance.

Equity of funding and Access funds

In the 2000 study (Fletcher 2000), some colleges reported using Access funds to support non-EMA students, and giving transport assistance to many more. There was concern about the continued existence of Access funds once EMAs were implemented nationally. If the scheme were rolled out nationally on the same basis as the pilot, it would not assist many students who currently benefited from college-funded support, and colleges might feel it necessary to continue to assist them. If EMAs were to cover a wider age range and extend beyond the current 2 years, a case could be made for reducing Access funds for young people, though not removing them.

These findings were also reflected in the 2001 responses. The general FE colleges were concerned that reducing the Learner Support (Access) Fund would militate against campaigns to improve participation, particularly among mature students.

- Lewisham College conceded that if EMA were universal and available for 3 years, less Access funding might be required for the 16–18 cohort. However, the college's many mature students need money for books, equipment, travel and childcare.
- NE Worcester College was so concerned that Access funds might disappear, it did an analysis of its recipients: 77% of applications for Access support were from students aged 19 and over. Their total Access payments rose over the 2 years from £82,000 to £217,921. 'It would disadvantage us to have Access funds replaced by EMAs. Access funds are used to help mature students with a low income to return to college, by contributing to their childcare, transport, books and equipment costs. If we didn't have these funds we would no longer be able to support these students.'
- Gateshead College thought it was rare for Access funds to go to EMA students, but they did support others aged 16–18 and, predominantly, adults.

- New College Nottingham noted that it would be impossible for some families to meet up-front costs of £350–£400 for equipment kits without the Access money. Other support was for travel and childcare.
- Similarly, Leicester College used Access funds to assist with travel, childcare, books, visits and starter kits for certain courses, for students in dire need and to provide bursaries for those not eligible for EMA. They also 'referred students to Access funds because of an LEA delay in processing applications'.
- Cornwall's Learner Support Fund 'is available to assist students whose EMA is still under assessment or for those who need a bulk payment for a college trip, bus pass, etc. The fund also assists non-EMA students but is only accessible on a first-come, first-served basis.'
- At Teesside Tertiary College, 649 students received support from the Learner Support Funds and many over-18 students would struggle without this assistance.
- Stoke-on-Trent College said that the withdrawal of Access funds would leave a 'massive void' and would be 'catastrophic'.
- Stoke-on-Trent College reported 'healthy debate at [the] local steering group regarding how to apportion payment of achievement bonus across more than one qualification'.
- New College Nottingham reported great debate as to what constituted 'achievement' and called for a better definition. They felt the £50 achievement bonus was an insufficient incentive compared with the £40 weekly payment.
- Gateshead questioned the distinction between AS studies (bonus payable) and the first year of a vocational course (no bonus payable).
- Cornwall took the view that achievement of whatever was specified on the learning agreement triggered the bonus payment, irrespective of its timing in a calendar or academic year.
- Teesside Tertiary College said: 'The achievement bonus was difficult to administer with some vocational courses ... where students had often passed part of their course ... Anyone achieving partial success was awarded £25 instead of £50 ... it was impossible to distinguish between them further.' The college also questioned the term-end retention bonus payable on 95% attendance: 'Is it fair to withhold the bonus from a student with 94% attendance whilst awarding it to a student with 80% attendance, but whose absence has been authorised?'

Bonus payments

At the time of the initial study (Fletcher 2000), no achievement bonus had been paid. Colleges believed that a lump-sum bonus might be a real incentive, but it was too early to judge. If attendance bonuses demonstrably improved retention and achievement, there would be a strong case for such a scheme nationally. However, colleges with manual registration systems could find themselves under severe pressure.

The Phase 1 pilot institutions participating in the 2001 survey had by then gained experience of achievement bonuses, and clearly there were difficulties. There is an evident need for clarification about what was intended to trigger the achievement bonus. Should it be payable only when the student achieves the main qualification aim, or when 'intervening' qualifications are achieved? If EMA is extended to 3 or 4 years for lower-ability students, can the student qualify for an achievement bonus at the end of each year? Is the balance between weekly allowance and achievement bonus set correctly?

- Oldham Sixth Form College was clear that the £50 bonus was payable only on completion of a course.
- Similarly, the King Edward VI School reported an LEA directive that a bonus can be paid at the end of a 1-year vocational course, but students on a 2-year course would receive no achievement bonus at the end of the first year.
- In contrast, City of Leicester School & Sixth Form Centre was collecting achievement data on the understanding that students will qualify for the £140 bonus on achieving AS qualifications at the end of the year, and for a further £140 bonus when they achieve their A2 qualifications next year.
- Leicester College called for a more detailed definition of 'successful completion' and 'eligibility', but expects students to receive the £140 'when they pass the course'.

- Taunton's College found that 'the current system is deeply flawed', but noted: 'Curriculum 2000 will, almost incidentally, bring [about] an improvement. Last summer those who had taken any low-level 1-year course such as CLAIT as part of a full-time course were eligible for a bonus, whereas students on only 2-year courses missed out. Only those on 2-year vocational courses will miss out in the future because of the advent of AS levels.'

Suggestions raised at the EMA seminar included:

- proportional payment for part achievement
- linking the bonus to what is in the learning agreement only
- awarding a bonus to students with learning difficulties on certification by their tutor, rather than for qualifications achieved.

Transport EMA

In September 2000, a variant of the original EMA scheme was introduced, by which *actual transport costs* were paid instead of a weekly allowance. NE Worcester College, for example, saw a benefit in the scheme, in that it offered support to students that was not previously available. But they reported concerns 'from students who applied late and had to wait several weeks for EMA and travel passes to come through' or 'when payments weren't authorised as they had missed the 2-week deadline for authorised absences'.

Among colleges not in Transport EMA areas, Oldham hoped that the Transport EMA would *not* become the norm, because the weekly allowance covered much more than travel passes. New College Nottingham already funded transport for some students from outside the EMA area and transport schemes were also provided by the LEA. Teesside Tertiary College agreed that the introduction of a Transport EMA would represent no gain whatsoever for many students.

Key points

- Respondents stressed the need for timely and impartial information to potential applicants, with early and wide distribution of forms.
- The 'natural parent' rule is a barrier for many young people. The 2-year limit on entitlement is inappropriate for many learners. Extension in particular circumstances is called for.
- Delays in the approval process caused a range of problems.
- Learning agreements could usefully include conditions related to achievement and observance of college rules, rather than merely attendance or punctuality.
- Definitions of 'lateness' and 'authorised absence' vary, even within the same institution, causing inequities. Staff development on EMA implementation is necessary. National guidance and standardised, simplified attendance forms would be welcomed.
- The cost of monitoring remains a major bone of contention; most colleges required extra staff to administer EMAs. Electronic systems can be more efficient, but are not unproblematic. Timesheet systems placing responsibility on students have been used increasingly, but are vulnerable to abuse.
- There is general concern that implementation of EMAs might result in reduction of Learner Support Funds.
- Clarification is needed about what was intended to trigger the achievement bonus.
- The transport variant of EMA was thought to represent no gain whatsoever for many students.

The impact of the scheme

Enrolments

The factors influencing enrolment figures are complex, but EMAs appeared to have had a positive effect. In Middlesbrough, for example, only 48.2% of Year 11 leavers in 1998 continued in full-time education; this figure increased to 64.3% in 1999, when EMAs were introduced.

A sampling of enrolment figures with EMA numbers for 2000/01 reflected some changes from the norm, but no consistent pattern:

- Leicester College saw a slight increase in enrolments, but Worcester had a 12% reduction
- at Morpeth School, a 7.5% increase in enrolments followed their best-ever GCSE results
- New College Nottingham thought improved GCSE results 'may account for an increase in the staying-on rate'
- however, EMA may well have been a significant factor for the 10% growth in enrolments at Leicester School & Sixth Form Centre.

There was wide variation in take-up. In the second year, EMA enrolments ranged from 17% to 55% – averaging 37% – of the total student cohort at Phase 1 colleges. Four Phase 2 institutions supplied enrolment figures, which ranged from 17% to 36% (average about 26%).

Analysis of 1999/2000 ISR data revealed that more than 20% of students in the pilot areas qualified for EMAs, and just over 21% of 16-year-olds in pilot area colleges were in receipt of EMAs. This was considerably less than the 50% suggested by the sample college figures.

Our findings on EMAs and attendance patterns support the results of the wider DfES survey (Legard *et al.* 2001). In 2000, it was found that nearly 80% of EMA students (by definition from the most deprived backgrounds) were studying for qualifications at Levels 2 and 3. It was anticipated that EMAs could lead to a greater demand for college advisory and support services due to the increase in students from areas of disadvantage (though not, perhaps, greater than the support required following introduction of the Widening Participation factor).

Widening participation

As entitlement to an EMA is based on family income, and those on higher incomes are excluded, it might be expected that colleges would attract Widening Participation uplifts for a greater proportion of EMA students than students not entitled to EMAs. The ISR data does not support this expectation. Over half (56%) of EMA recipients attract no WP uplift, compared to fewer than 49% of non-EMA students.

There is some evidence from 2001 that, for colleges in or near areas of deprivation, introduction of EMAs may have a significant effect on recruitment and progression.

- Morpeth and Leicester schools reported that EMAs may have encouraged some students from WP areas to return to school and attend regularly.
- Stoke-on-Trent noted that 69% of its EMA students are on the maximum allowance and, therefore, likely to be from WP areas.
- NE Worcester recorded the largest change: in 1999/2000 there were 11 EMA students from WP areas, while in 2000/2001 there were 92.

Gender differences

The 2001 research found no evident link between EMA and the male/female distribution of students; in most cases the pattern reflected the college norm. ISR data indicated that a very slightly higher proportion of females received the allowance. Male and female enrolments were fairly evenly balanced, but 22.4% of female students and 20.1% of male students were in receipt of EMAs. The male/female balance is reversed in non-EMA enrolments, but this difference is probably not significant enough to suggest that the scheme is encouraging more female enrolments.

Ethnic background

Summarising ISR data on ethnic background into three main categories (see table) reveals that a higher proportion of White students and students of Asian heritage are in receipt of EMAs, compared with those not in receipt of the allowance. Only about a quarter of Black students are in receipt of EMAs.

Student population in pilot areas	Non-EMA students	Students in receipt of EMA	Ethnic background
White	83%	74%	76%
Black	2%	10%	8%
Asian	11%	9%	8%

An unpublished analysis of the 2000/01 ISR data, supplied by the Learning and Skills Council

A higher proportion of Black EMA recipients would be expected. Black students and their parents may need more encouragement in making EMA applications.

Introduction of EMAs in areas with a particular population mix might increase the numbers of students from ethnic minority backgrounds who choose to continue with their education.

- NE Worcester College reported that 95 students in 1999/2000 regarded themselves as coming from an ethnic minority background; this increased to 109 (17 of them on EMA) in 2000/01.
- Stoke-on-Trent College noted that a slightly higher proportion of EMA recipients than non-recipients regarded themselves as coming from an ethnic minority background.
- At Oldham Sixth Form College, 24% of the total age cohort, but 35% of EMA recipients, came from Asian heritage backgrounds.

This sample is, however, very small.

Qualifications on entry

ISR data indicates that students in receipt of EMAs apparently have more qualifications on entry to college than others, and at a higher level. Of the 6168 EMA students, 65% had qualifications on entry, compared with only 52% of non-EMA students. This indicates that EMA students tend to be better qualified on entry to college, and EMA may have encouraged more well-qualified young people to stay in education.

Qualification aims and level of studies

During the first year of the pilot, payment of the EMA encouraged 16-year-olds to persist in college to achieve their qualification. Their qualification aims were more numerous and tended to be at a higher level. Nearly all 16-year-old EMA students were on the first year of a course.

It is difficult to discern a national pattern across courses and levels, but it is clear that a high proportion of EMA recipients are undertaking advanced studies. In 2001, a higher proportion of EMA students were on level 3 courses (38% v 31% for non-EMA students). The proportion of qualifications at Levels 2 and 3 taken by EMA students was 65%, down from nearly 80% as reported in the 2000 study (Fletcher 2000). EMA students were undertaking an average of 3.3 qualifications each, compared with 3.2 each for non-EMA students.

- Morpeth School believed that the introduction of EMAs may have influenced enrolments on its Intermediate GNVQ course.
- At Oldham Sixth Form College, 6.7% of the age cohort were on GCSE and Intermediate GNVQ courses, compared with 10.3% of EMA students.
- The distribution of EMA students at Stoke-on-Trent College was 31% on foundation programmes, 38% on intermediate and 31% on advanced.
- At Teesside Tertiary College, only 22% were on intermediate programmes, with the rest again divided equally between foundation and advanced.

Other institutions did not report any significant factors in enrolment distribution, and no conclusions can be drawn from these figures about the effect of EMA on course enrolments or distribution across levels.

Retention and achievement

There was some evidence in the 2000 survey that the introduction of EMAs improved retention. Evidence of any improvement in achievement and persistence into a second year of studies was expected to become apparent from ISR records. In general, colleges saw some improvement in retention, achievement and progression in 2001.

Retention

There is some evidence that EMA payments are improving retention:

- Stoke-on-Trent College retained 84% of EMA students, but only 76% of non-EMA students
- Taunton's College and Cornwall College also reported higher retention of EMA recipients
- NE Worcester College noted a general improvement in retention rates, coinciding with the introduction of EMA.

However, this is not consistent across the country:

- New College Nottingham retained a slightly lower percentage of EMA students as against the age cohort
- King Edward VI School saw no difference, but retention was 'not normally a problem'
- Oldham Sixth Form College's retention rate for both EMA and non-EMA students was 91%. It felt the improvement was due to the 1-year AS programmes: 'The test will be numbers staying on in the second year for A-levels'.

Achievement

No clear improvement in achievement is evident from the ISR figures. However, there is some indication that the EMA has 'levelled the playing field'.

- While Cornwall College found a significant difference between the retention rates of EMA and non-EMA students, achievement rates were almost identical between the two groups. This may indicate that if the allowance encourages students to stay at college, they are as likely to achieve their qualification as any other student.
- Similarly, Oldham students achieved equally well whether or not receiving the allowance, and at Stoke-on-Trent College the figures showed little difference.
- At Taunton's College, however, the achievement rates were 74% for non-EMA students and 66% for EMA recipients.

Progression

ISR data confirms that EMA payments may encourage students to remain at college. Although the statistics for 2000/01 were incomplete, slightly more EMA recipients (80%) had either fully or partly achieved their qualifications compared to non-EMA students (78%).

Slightly higher proportions of the EMA students were 'Continuing' (29% v 27%), had 'Completed' (53% v 52%), or had 'Transferred' to other courses (4% v 2%). Fewer EMA students had withdrawn (14% compared to 19% of non-EMA students).

The destination figures contained some uncertainties, but lead to similar conclusions. Excluding 'Unknown' numbers, 91% of EMA recipients are continuing with their programme or have moved on to a new programme at the same institution. The corresponding total for students not in receipt of an EMA is 88.8%. This suggests that EMAs may encourage slightly more students to persist in their studies.

- New College Nottingham recorded a progression rate of 73% for EMA students. The college noted that the impact of EMA 'may be less than in other areas as the result of the relatively high levels of support available from the LEA for students from low-income families'.
- At Stoke-on-Trent College, 66% of EMA students continued in further education, compared with 62% of non-EMA.

Key points

- EMAs appear to have had a positive effect on enrolment, though no consistent pattern was in evidence. The findings support the results of the wider DfES survey (Legard *et al*, 2001).
- There is some evidence that the introduction of EMAs may have had a significant effect on recruitment and progression in or near areas of deprivation. However, a lower proportion of EMA recipients overall attracted Widening Participation uplift.
- There is no evident link between the EMA and the male/female distribution of students. A higher proportion of White students and students of Asian heritage are in receipt of EMAs than not; Black students are under-represented in the scheme.
- No conclusions can be drawn about the effect of EMAs on course enrolments or distribution across levels.
- Although not consistent nationally, EMAs may improve retention. This is supported by ISR data. There is some indication that the scheme has 'levelled the playing field' regarding achievement.

The impact of EMAs on work-based learning

It has been suggested that the introduction of EMAs has reduced the numbers of young people entering work-based training. Nine TECs and careers services in Phase 1 pilot areas and nine in the Phase 2 areas were approached, to establish whether the scheme was having any discernible effect on the number of Year 11 school-leavers choosing work-based learning or training routes.

Some areas, such as Wigan, have seen little significant change. Others highlighted a gradual reduction in the numbers of young people entering work-based learning long before EMA was introduced – in the case of St Helen's from 23% to 18% in recent years. It was suggested that this trend might have been influenced by gradually improving employment prospects for school-leavers.

In some cases, the introduction of the EMA has apparently had a sudden accelerating effect on an established trend, only for the second year of the scheme to show a reverse in the trend. In 1999, when EMAs were introduced, Southampton saw a large fall (from 4% to 2.1%) in the numbers entering training, and an increase (from 67.9% to 71.1%) in those continuing in full-time education. However, in the second year of the EMA pilot, the trend was reversed and work-based training enrolments rose to pre-EMA level. Over the same period, the numbers entering Modern Apprenticeships, employment with training, and employment continued a slowly increasing trend. On the basis of the Southampton figures alone, it is difficult to argue that the introduction of the EMA has encouraged a greater proportion of young people to continue in education.

There was some evidence from the sample that EMAs are affecting the numbers entering the various forms of work-based training.

- Leicestershire TEC's analysis at the end of December 2000, three months after the introduction of the EMA, shows a 10.5% reduction in the numbers entering training programmes. The TEC reported: 'We have no substantive evidence to show that the decline ... is directly attributable to the introduction of EMAs, but our suspicion is that some or all the decline experienced in our starts is indeed a consequence of EMAs being introduced'.
- The Oldham Careers Service Partnership tracked Year 11 destinations from 1988 to 2000. During those 12 years, FE enrolments more than doubled (31.2% to 68.3%), while funded training and employment numbers declined markedly (34.9% to 10.9% and 19.1% to 8.9%, respectively). EMAs, introduced in Oldham in September 1999, may have slightly accelerated the trend, but recent increases were far below those of the early 1990s. The economic conditions in the early 1990s were, of course, substantially different, but the comparison does suggest that over a fairly long period a variety of factors have influenced staying-on rates.
- Bolton/Bury Chamber of Commerce and Enterprise is unequivocal in its analysis of the effect of the scheme. It reported an 8% increase in those entering further education in the first year of the EMA, with a 'consequent drop' in those entering work-based learning and employment. It concluded that 'EMA is without doubt affecting the availability of 16 and 17 year olds for recruitment into WBTfYP [Work-Based Training for Young People]'.
- Doncaster TEC similarly attributed a 20% drop in 16–18 starts in 1999/2000 to the impact of the EMA.

In other words, there was some evidence that EMAs have not drawn non-learners into further education, but merely changed the learning route from employment to training.

Unpublished figures produced by Leeds Careers Guidance on Year 11 destinations indicate a slow but consistent increase in the proportion of young people continuing in education from 1994 to 2000. Their 1999 destinations report cited 'a significant rise of 3.62% in the proportion of students continuing in full-time education' when the EMA was introduced. The 2000 figures produce a pattern very similar to that in Southampton: a sudden and unexplained reduction in the proportion continuing in education in the second year of EMA. Unlike Southampton, there is also a dramatic fall in the proportion entering work-based training. Even stranger is the increase of 3.58% in the proportion of Year 11 leavers entering employment with training. This pattern is not evident elsewhere.

Again, it is difficult to argue that EMAs are the sole cause of reductions in the numbers in work-based training. The 2000 Year 11 destination figures reveal a reduction in the numbers in full-time education, but an increase in those studying A/AS-levels and NVQ2 or equivalent, as well as increases in Modern Apprenticeships and National Traineeships. In 1999/2000, 53% of the cohort continuing in education were undertaking A-levels or AS levels.

Leeds TEC recently investigated why young people post-16 drop out of education and training. Initial analysis of recent data suggested that an increasing proportion of young people going into employment with training reflected 'the extent to which employers ... are obliged to offer training in order to recruit and retain young staff'. The report (unpublished) predicted a pattern similar to that noted elsewhere, where the numbers remaining in education will increase and the numbers entering work-based training will decrease, but at an accelerating rate.

The Government Office for the West Midlands report (GOWM 2001) covered two Phase 1 EMA areas – Walsall and Stoke-on-Trent.

- In Walsall, there had been a 1.2% reduction in numbers entering work-based training and an increase of 2.4% in those continuing in education in the first year of the EMA. In 2000, the numbers for both increased, by 2.7% and 1.2% respectively. Seventy per cent of 1999 EMA students continued into a second year.
- In 1999, Stoke-on-Trent saw a 3.7% reduction in the numbers entering work-based training and an 8.8% increase in those continuing in education. In 2000, there was a 2.2% *reduction* in those continuing in education and a 0.9% *increase* in those going into work-based training – a pattern not dissimilar to that in Southampton and Leeds.

Key points

- Some areas highlighted a gradual reduction in young people entering work-based learning; others have seen little change.
- In some areas, the introduction of EMAs seemed to accelerate an established trend, with a reversal in the second year.
- There was some evidence that EMAs have not drawn non-learners into FE, but merely changed the learning route. However, EMAs are unlikely to be the sole cause of reductions of the numbers in work-based training.

Implications

For schools and colleges

Recruitment

To maximise enrolments, colleges and schools need to ensure that EMA information is distributed to all potentially eligible enquirers and applicants. Colleges and schools should take every opportunity to promote the allowances and encourage potential EMA students to apply to the LEA – even where students may not consider the weekly payment worth the effort. Details should be included with prospectuses and information packs, and should be available at open days, admission interviews, induction sessions and any other opportunity to get the message across. Information on the geographic distribution of students will be useful in identifying non-claimants who may need reminding of their eligibility for EMAs.

Administration

Colleges and schools need to influence the LEA at an early stage to ensure that the weekly returns procedure is as simple as possible, provides the minimum amount of information to satisfy monitoring requirements, and blends well with their own registration system.

Colleges and schools benefit from a precise definition of 'lateness' that is standardised across the institution and leaves no leeway for interpretation by different members of staff. A consistent approach within an institution is more important than consistency between different institutions.

Colleges may benefit from some form of electronic registration system; those already considering such an installation should proceed with the needs of EMA monitoring in mind. An acceptable alternative might be to make students responsible for completing timesheets. However, significant problems have been reported with forged timesheets. An efficient means of collecting timesheets each week is necessary.

Any form of registration system used to provide data for allowance payments must include 'codes' or 'flags' to distinguish between 'authorised' and 'unauthorised' absences. Schools and colleges are advised to introduce an 'at risk' policy for regular unauthorised absentees, rather than stopping the allowance as a form of punishment.

Monitoring systems that accumulate student data over a term to provide evidence of 95% attendance will greatly reduce administrative effort. Monitoring systems need to record the achievement of all EMA criteria, such as 'satisfactory behaviour' and 'ongoing achievement'. LSDA believes that colleges will wish to fine-tune their tracking procedures to provide evidence of improved attendance, achievement and progression. The crucial stage to be encouraged is attendance, from which achievement and progression follow.

Conditions

Colleges and schools could consider the inclusion of condition clauses in student contracts for other allowances, if the pilot proves these to be worthwhile. Such criteria will help improve overall achievement rates, for example by making clear that additional learning support must be taken up where recommended or that satisfactory behaviour is essential. This mechanism should be used sensibly – its purpose is to improve achievement, not to punish EMA recipients.

Colleges should consider the possibility of bonus payments outside the EMA scheme, if these can be managed cost-effectively, to encourage retention and achievement.

Student support

Colleges and schools in catchment areas with a particular population mix from areas of deprivation should be prepared to support many more students. Colleges involved in the extension of the EMA pilot, in which there are many poorer districts, should expect up to 50% of the relevant student cohort to be eligible for the allowances and should prepare their administrative systems for dealing with such numbers.

The EMA application process is more difficult than applying for assistance on HE programmes or for Access funds. Staff must be prepared to assist prospective applicants and their parents with form-filling.

Staff support

All staff must be made aware of EMA regulations, as most are likely to be involved at some stage. Priority in staff development needs to be given to those responsible for collating the statistical returns for LEAs. Staff responsible for recording attendance and absence must be made aware of the precision required in recording absences and the potential significance of their actions.

Staff might face uncomfortable situations. College and school staff dealing with complaints about the allowance should not be located in isolated areas.irate parents can make a situation very tense and staff security must be a consideration.

Wherever possible, the duties of EMA payment withdrawal and consequent actions should be separate from the student support function. It is essential to ensure that student support staff remain in a supportive relationship with the students and are not perceived as responsible for stopping payment.

For LEAs

Commonality

LEAs need to take the lead in bringing together all partners in a steering group to oversee the implementation of EMAs in an area.

Common administrative procedures are needed between neighbouring LEAs. LEA clusters involved in the future extension of the scheme should adopt common practices and use common documents. (The London model represents an example of good practice.)

A common definition of 'authorised' and 'unauthorised' absences, across all institutions within an LEA's boroughs, is advised.

Publicity

Extensive advanced publicity by the LEA is necessary to ensure that all eligible students are made aware of their EMA entitlement. Publicity material and, in particular, application forms must be freely available. Consideration might be given to using the careers service/Connexions to distribute unbiased information. Publicity and marketing materials need to give equal emphasis to EMA availability for school or college attendance.

LEAs need to agree on the timing and nature of, and vehicle for, publicity. Marketing should be monitored, to ensure that there is no bias in the messages given to pupils at school. Early distribution of EMA literature is essential, as is ensuring that pupils and, in particular, their parents receive the literature at times of maximum impact – not during exams or half-terms.

Procedures

Delays in processing claims should not disadvantage students. Systems need to be introduced to ensure that schools and colleges can complete learning agreements as soon as the LEA confirms receipt of an EMA application.

The learning contract should be as short and simple as possible, ensuring that students and their parents understand the conditions and making crystal clear the payment criteria that will be applied.

LEAs need to work to an action plan that ensures confirmation of students in receipt of awards is available to each college and school at the start of the academic year. Once the term has started without a list of authorised EMA students, colleges face the potentially time-consuming task of retrospective checks on registers and authorised absences in order to authorise back pay.

Weekly reporting procedures should be standard for all schools and colleges, and understandable by students and parents to minimise appeals and help administrative staff deal with enquiries. The procedures should also be common to neighbouring LEAs, which could accept each other's returns and forward them accordingly, to reduce the workload on the educational institutions.

For the DfES

National consistency

Consideration should be given to requiring LEAs to adopt a national model. The London model of cooperation is a clear example of good practice. In the event of a national roll-out of the scheme, many more schools and colleges will have to deal with multiple LEAs. A single national application form would be beneficial, reducing bureaucracy and costs.

Application forms should be as simple as possible; a DfES template, available to LEAs, would simplify administration of a national scheme. Generic EMA publicity leaflets are needed that can be used nationally and targeted at parents and pupils.

National guidelines would assist LEAs with the:

- form of absence return
- definition of 'authorised absence'
- provision of clear information for prospective claimants.

National guidelines would ensure a level playing field for schools and colleges.

Clarifications

The 'natural parent' rule causes considerable delays and frustrations. Clarification of the rules relating to parental or family income is needed urgently, with widespread publicity of the details.

Clarification of the achievement bonus is needed. Should increased bonuses be paid when students achieve their qualification aim – perhaps by reducing the weekly or termly allowance?

Consideration needs to be given to the longer term implications of the 2-year limit on EMA entitlement. For maximum benefit to students, support is needed for the duration of their studies. LSDA recommends a 3-year minimum. Confirmation of a change of policy is urgently required.

Funding

A government contribution towards the cost of additional administrative tasks involved in processing EMAs would be welcomed by colleges, as installation of accurate monitoring systems will be costly for colleges or schools.

Any reduction in Learner Support Funds or Access funds must be considered in the context of student groups excluded from receiving EMAs. Loans for students aged 16–18 in need of emergency financial support, and support for EMA and non-EMA recipients who face very high costs, must also be taken into account.

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Since 1999, some schools and colleges in England have been piloting Education Maintenance Allowances (EMAs), testing whether extra funds encourage more young people from low-income families to participate in full-time education and training and to complete their course successfully. This report assesses the impact of the 3-year EMA pilots, particularly from the provider's viewpoint.

The study highlights issues for consideration by educational institutions, local education authorities and government before EMAs are implemented nationally. The report covers administration of the scheme – from planning and publicity to monitoring and staff development, its impact on enrolment, retention and achievement, and its effect on work-based learning.

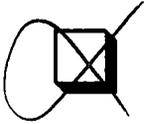


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