

Education Maintenance Allowance

– An introduction





The Education Maintenance Allowance (EMA) will be available nationally across England from September 2004 to eligible young people on further education courses (such as AS/A2, GNVQs, NVQs, GCSEs) in school sixth forms, sixth form colleges and FE colleges. Around 450,000 young people could be benefiting from extra financial help to enable them to stay on in post-16 education. How does this affect you?

(1) What is an EMA?

The Education Maintenance Allowance (EMA) is a weekly payment of up to £30, paid directly to young people who stay on in further education after they reach statutory leaving age (i.e. after the end of their compulsory schooling). Young people may also receive bonuses of £100 if they remain on their course and make good progress with their learning. Bonuses will be payable in January and July in the first year of study, and in September, January and July in subsequent years of study.

(2) Why is the Government providing this financial support?

We recognise that for some young people there are financial barriers to participating in education, particularly for those from lower income households. Evidence from the pilot schemes that have been running since 1999 has shown EMAs have had a positive impact by increasing the numbers of young people participating in post-16 education, reducing the numbers who drop out of education and by providing incentives that contribute to higher attainment.

(3) Who will be entitled to an EMA?

Entitlement to EMA depends on an assessment of household income. Any young person who is thinking of staying in further education and who lives in a household with annual income of £30,000 or less should apply for an EMA. We assess household income using the same rules the Inland Revenue uses to assess eligibility for Tax Credits.

The weekly allowance will be paid at three levels - £10, £20 and £30, depending on household income. Those young people from households closer to the £30,000 threshold will receive the lower £10 weekly rate. Those from families with income levels below £19,000 will receive the full £30 rate of EMA. The precise income thresholds will be available in early 2004.

In the first year of the national scheme all young people aged 16 planning to continue their education in school or college from September 2004 can apply. In existing EMA pilot areas young people currently in a school or college and who plan to continue their education into Years 13 or 14 from September 2004 can continue to apply for an EMA. Entitlement will be calculated using the rules for the national award.

(4) For how long will each young person receive their EMA?

Most young people will get their EMA for two years (as long as their household income does not rise above the £30,000 per annum threshold). The EMA will be available for three years for those young people who may need additional time in further education to achieve their full potential.

(5) So how do young people apply?

EMA entitlement is based on an assessment of household income in the previous financial year. The Department for Education and Skills is appointing a National Service Provider to act as the Assessment and Payment Body (APB). Young people can complete the application form and send it with details of the household income to the APB from May 2004. Further information on the details of the application process and availability of forms will be made available in early 2004.

The Assessment and Payment Body will notify all applicants about whether or not they are entitled to an EMA. A young person will receive EMA payments once they have enrolled at a school or college and have started a valid programme of study. Payment of bonuses will depend on the young person showing satisfactory progress against learning objectives set out in their learning agreement and through an on-going commitment to remain in education. All payments will be made direct to the student's bank account. Payments will only be made to those students who have satisfied the attendance requirements.

(6) What does this mean for schools and colleges?

Schools and colleges have an important role in making sure young people are aware of EMAs, and in encouraging them to take up the allowance. Awareness of EMAs should form part of the careers education and guidance programme for young people up to and including Year 11. Schools and colleges will be required to notify the Assessment and Payment Body weekly of their decision to pay or not to pay each of their EMA entitled students. Attendance and monitoring systems will need to be sufficiently robust to show that the authority to pay an EMA is based on a satisfactory attendance record. Schools and colleges will need to keep evidence to support EMA payment decisions. There must be an appeals process for any students who may wish to challenge the reason for stopping their weekly payments or bonuses.

(7) What does it mean for the local LSC?

The local LSCs will co-ordinate the local implementation of EMA, ensuring that schools and colleges have clear milestones in preparing for their responsibilities. Local LSCs will work with LEAs and Connexions Services to identify schools and colleges who need support. They will draw on data available from the Assessment and Payment Body (APB) to assess how well their area is preparing for delivering EMA from September 2004.

(8) What does it mean for local Connexions Services and LEAs?

The Connexions Service will focus support on individual students. They will work with schools and colleges to provide a coherent programme of careers education and guidance that includes information about EMAs, alongside other financial support such as transport, Learner Support Funds, childcare and the Connexions Card.

They will also target those young people who can be motivated to return to learning or who are at risk of dropping out of learning. The LEAs involved in the pilots have valuable experience in delivering EMA at the local level which can help inform the effective delivery of the national scheme. LEAs will work with the local LSC and Connexions Service to help ensure that young people are informed about EMA and that the appropriate arrangements are in place, particularly for Year 11 pupils and those in school sixth forms.

(9) What will the Assessment and Payment Body do?

As well as assessing applications and making payments to young people, the Assessment and Payment Body (APB) will offer a help-line and provide on-line information via a web-site and be responsible for processing applications and payments. Information on payments and stoppages will be made available to schools and colleges by the APB.

(10) What happens next?

Raising the awareness of young people – During 2003-04 it is important that Year 11 students receive information about EMA. National publicity material will be available to raise awareness amongst young people about their potential entitlement to the allowance. This will help schools, colleges and the Connexions Service give messages about EMA to young people, for example through careers education lessons from year 9, open evenings, careers conventions, career planning events and through the liaison work of the Connexions Service. Early notification (Year 9 onwards) might influence a young person to stay on in learning post-16.

Planning – Schools and colleges will want to make an assessment of the likely take up of EMA and the impact on participation levels in 2004-05. They are encouraged to reflect the messages in this leaflet in their prospectuses and planning documents. Detailed guidance on the requirements for administering EMA will be issued to schools and colleges later in 2003.

Guidance and consultation – A programme of regional conferences will be delivered in Autumn 2003 to raise awareness in schools and colleges and amongst local partners, and to consult on the guidance for the national scheme. All post-16 course providers will receive guidance and have the opportunity to attend a further programme of seminars about the administrative requirements for EMA.

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