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A review of the Education Maintenance Allowance in Wales: technical report

Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

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A review of the Education Maintenance Allowance in Wales:
technical report

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Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

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Annex A: Discussion guides

This Annex sets out discussion guides for:

1. interviewing Welsh Government and SLC officials during the scoping stage
2. facilitating a focus group discussion with current Year 12 and 13 EMA recipients
3. facilitating a focus group discussion with Year 11 learners
4. facilitating a focus group with learners in care who are EMA recipients
5. facilitating a focus group with non-EMA recipients (unsuccessful applicants / those just over the eligibility threshold)
6. facilitating focus groups with learners at English educational settings (English domiciled and Welsh domiciled, not in receipt of EMA support)
7. interviewing previous EMA recipients (now school/FE leavers, effectively Year 14 cohort)
8. interviewing parents/guardians, including those responsible for learners with ALN
9. interviewing key stakeholders during the fieldwork phase
10. interviewing Learning Centre leaders
11. interviewing non-Wales learner fund administrators.

Discussion guide 1: Scoping interviews with key stakeholders

These questions will be tailored according to contributors' role and involvement with the EMA and not all questions will be posed of all contributors. For instance, questions for Welsh Government officials will focus on those relating to policy and need; whilst questions for SLC and Learning Centre representatives will focus on those relating to administration and design. The questions cover a broader remit than is required of scoping interviews but this will hopefully avoid having to re-interview the same contributors during the fieldwork phase.

Introduction

1. Tell me about your involvement with post-16 student finance, including the EMA

Policy, rationale and need for EMA

2. What do you understand to be the aims and objectives of the EMA?
 - How, if at all, have these objectives changed over time?
3. How is the EMA expected to contribute towards Welsh Government policy and strategy?
 - a. Which key policies and strategies does it contribute towards?
 - b. How well aligned is the EMA with the Wellbeing and Future Generations Act?
 - c. How does the EMA support Cymraeg 2050: A Million Welsh Speakers?
4. To what extent is there a need for EMA?
 - a. Why do you say this?
 - b. What evidence do you have about the current financial barriers facing young people from low-income families to stay in formal education?
 - c. How has the need for EMA changed in light of recent cost-of-living pressures?
5. What other statutory and discretionary student support provision are available in Wales to support post-16 learners?
 - a. How does EMA fit with these?
 - b. How does EMA align with the Financial Contingency Fund (FCF) available to FEI learners?
 - c. How was any additional funding provided to FEIs to support learners during the cost-of-living crisis utilised?
 - d. How does EMA align with subsidised provision such as free transport and free school meals?
 - e. How much overlap is there in terms of learners accessing EMA and these other subsidised provisions?
6. What other schemes targeting similar cohorts are available e.g. Jobs Growth Wales+?
 - a. How does EMA compare with these in terms of eligibility, the financial offer and implementation?
 - b. What works well/not as well with these schemes?

7. How does EMA compare with the provision of financial support to post-16 students in other parts of the UK?
 - a. What are the main differences in eligibility criteria between Wales and other devolved nations?
 - b. What are the advantages and disadvantages of the EMA?

EMA design

8. How appropriate is it that the EMA is made available to learners on the basis of household means testing?
 - a. What are your views on the eligibility thresholds¹ (which have remained unchanged since 2011/12)
 - b. What are your views about the consideration of other dependants in the household?
 - c. What changes, if any, should be considered to these thresholds?
 - d. What other eligibility model should be considered? Why do you say this?
 - e. How appropriate is it that the funding is paid directly to the learner rather than parent/carer?
9. Why has there been a drop in the number of EMA applications and approvals since 2010/11?
10. What accounts for the fact that 73% of all EMA recipients are based at FEIs? Why has the proportion increased over time?
11. Do you think the profile of EMA recipients has changed over time? If so, what accounts for this? Ask about:
 - a. In terms of age
 - b. In terms of eligible courses
 - c. In terms of setting (FEI/school)?
 - d. In terms of rural/urban split?
 - e. Do you think the EMA is supporting students who are most in need? Why do you say this?
12. How appropriate is the current EMA allowance level of £40 per week²?
 - a. Should this be revised at all?
 - b. How could an appropriate allowance level be determined on an ongoing basis in the future?

¹ Student living in a household that has an annual income of £20,817 or less if the applicant is the only dependant, or students living in a household that has an annual income of £23,077 or less if there are other dependants in the household (dependants are 15 or under or aged 16 to 20 and in full-time non-advanced education or training, and eligible for child benefit).

² In April 2023, the allowance was increased to £40 for the two forthcoming academic years

13. What is meant by the 'full exemption categories' for EMA?
 - a. How appropriate are these?

EMA administration

14. What have been the key changes made to the EMA guidance and eligibility criteria to the EMA over the last few years?
15. What does the EMA application involve from a learner's perspective?
 - a. What are the implications for learners (and parents/guardians) of introducing an electronic-based application for EMA?
 - b. What are the key application steps for learners?
 - c. On what basis are applications rejected?³
16. What evidence do you have about the impact of increasing the weekly allowance (from £30 to £40)?
17. What other changes have been made to the EMA implementation over the last few years?
 - a. What impact have these changes to the EMA had?
18. How is the EMA publicised and communicated to learners and parents?
 - a. How effective are these methods?
 - b. What works well?
 - c. How could the promotion of the EMA be improved?
19. How are EMA Learning Agreements administered?
 - a. What steps do Learning Centres adopt to administer and monitor these?
 - b. How effective is the use of the EMA Learning Agreements?
20. What monitoring data do Learning Centres collect about EMA recipients engagement and attendance?
 - a. How appropriate is attendance as a performance measure?
 - b. What other measures could be used/are gathered by Learning Centres e.g. completion of coursework, contribution in work/lessons, behaviour etc
 - c. Are the discretionary arrangements introduced in response to the Covid-19 pandemics (whereby Learning Centres operated and maintained their own attendance policies) still being applied?

This evaluation

³ Some 8% of all applications are rejected

21. This study involves undertaking fieldwork with a wide range of contributors, including future, current and previous learners⁴. Do you have any thoughts on our proposed work programme in terms of:
- a. Identifying and recruiting learners, particularly those in care, student carers and those with ALN
 - b. The questions which we might need to ask
 - c. The issues which might be raised during our conversations with learners?

Future

22. Should the WG continue to financially support post-16 learners directly in the future?
- a. If so, how should this financial support be made available e.g. statutory/discretionary basis?
 - b. On what basis should learners receive financial support (e.g. household income, attendance, for specific provisions)?
23. Could the WG use its EMA funds in a more effective way?
- a. If so, how?
 - b. How could the EMA (or equivalent) better target financial support towards those in greatest need?
 - c. How could those in care, care leavers and student carers be most effectively supported?
 - d. How could learners with ALN be most effectively supported?
 - e. How could students from the most deprived backgrounds be supported?
 - f. What other ways/models could be explored to achieve similar outcomes?
24. How might the EMA (or equivalent) be reviewed on an ongoing basis in the future?
- a. What steps/processes could be adopted?

⁴ Year 11 learners; current Year 12 and 13 EMA recipients; previous EMA recipients (now school/FE leavers, effectively Year 14 cohort); non-EMA recipients (unsuccessful applicants / learning outside of Wales); school and FEI leaders; parents/guardians; learners in care who are EMA recipients; learners (and parents/carers of) with ALN and stakeholder organisations

Discussion guide 2: Focus group with EMA recipients

These questions will be asked of EMA recipients currently in Years 12 and 13, studying at FE/sixth forms and schools.

Introduction

Thank you for attending this focus group. I am here on behalf of OB3 Research, as we are undertaking a review of the Education Maintenance Allowance (often referred to as the EMA) for the Welsh Government. As part of this review, we wish to talk to learners receive the EMA. We are also talking to other learners as well as parents, staff and other groups. The research will be used to write a report for the Welsh Government in the summer.

The areas I'd like to discuss with you today include:

- your experience of applying for the EMA
- how you are using the funds (it doesn't matter how you're using the funds, you could be using it for books and equipment or for going out, it is just important for us to know how it gets spent. There is no risk that you'll lose the EMA by sharing this information)
- the difference receiving the EMA made to your decision to continue in education and what you would have done without the support
- the difference receiving EMA is making to your attendance and performance.

Confirm that:

- You or your school/college will not be named, or be identifiable in any way in the published report
- I expect the discussion to take around an hour
- Please do not repeat what people say today beyond this group
- I will not be sharing what you said with anybody else, unless there is a risk of harm to you or someone else
- [FEI settings] We offer a £10 voucher as a thank you for your time.
- Please complete a short form to provide some basic information about yourself. This will only be used by us to report on the profile of learners we talk to as part of this study
- [As appropriate] You may contribute in either Welsh or English
- [If mixed language group, explain that you will summarise any Welsh language contributions made in English]
- Should you wish to make any comments in confidence after the focus group then please do so after the session.

EMA Recipients Form	
Name	
Name of school / college	
Age	
What course or subjects are you currently studying?	
Are you currently receiving the EMA	<input type="checkbox"/> For the first time during this academic year <input type="checkbox"/> For the second or third year
How do you usually spend the EMA? (e.g. travel, food, clothing, socialising, books, equipment, rent etc)	
In addition to the EMA do you receive any other financial help or support: <i>Please tick all relevant options</i>	<input type="checkbox"/> Free school or college meals <input type="checkbox"/> Free or subsidised school or college transport <input type="checkbox"/> Financial help from the college <input type="checkbox"/> Another type of financial help, please specify: _____ <input type="checkbox"/> No, none <input type="checkbox"/> Don't know
Do you have experience of being in care?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you care for another family member?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you have any additional learning needs, such as a learning difficulty or disability, which makes it harder for you to learn?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you also have a paid job?	<input type="checkbox"/> Yes <input type="checkbox"/> No
[If you do work] When do you usually work in this paid job? <i>Please tick all relevant options</i>	<input type="checkbox"/> In the week (days and/or evenings) <input type="checkbox"/> On the weekend <input type="checkbox"/> During school or college holidays
How important was the possibility of receiving the EMA to your decision to stay in education?	<input type="checkbox"/> Very important <input type="checkbox"/> Fairly important <input type="checkbox"/> Neither important or not important <input type="checkbox"/> Not particularly important <input type="checkbox"/> Not at all important <input type="checkbox"/> Don't know
Had you not received the EMA would you have stayed on in education anyway?	<input type="checkbox"/> Yes, definitely <input type="checkbox"/> Yes, probably <input type="checkbox"/> Neither <input type="checkbox"/> No, probably not <input type="checkbox"/> No, definitely not <input type="checkbox"/> Don't know
Does receiving the EMA help you to attend school or college on a more regular basis?	<input type="checkbox"/> Yes, definitely <input type="checkbox"/> Yes, probably <input type="checkbox"/> Neither <input type="checkbox"/> No, probably not <input type="checkbox"/> No, definitely not <input type="checkbox"/> Don't know
Are you more able to engage in activities such as trips and extracurricular activities because you receive the EMA?	<input type="checkbox"/> Yes, definitely <input type="checkbox"/> Yes, probably <input type="checkbox"/> Neither

	<input type="checkbox"/> No, probably not <input type="checkbox"/> No, definitely not <input type="checkbox"/> Don't know
Do you have anything else to say about the EMA?	

Introductions

1. Briefly, ask attendees to introduce themselves e.g. name, subject/courses being studied; whether they work part time as well as study

Hearing about and applying for the EMA

2. When did you first hear about the EMA?
 - Did you hear about it whilst in Year 11/at school or (as appropriate) on joining sixth form/college?
 - Did you know that it was available to Year 12/13 learners in both school and FE settings?
 - Was it easy or difficult was it to find out more about it?
 - How, if at all, could the EMA be better promoted to learners (and if applicable) their parents/guardians?
3. Why did you apply for the EMA?
 - When did you first apply?
4. What did you think of the (paper based or online⁵) application process?
 - What was easy or difficult about the application process?
 - How easy or difficult was it to get hold of the necessary information (e.g. details about household income) to support your application?
 - Did you get any help to complete the application form (e.g. from school/college/parents)?
 - How could the application process have been made easier?
5. Did you already have a bank account, or did you have to set one up to receive the EMA?
 - Who else has access to your bank account?

Use of the EMA and its importance to you

6. What do you spend most of the EMA on?
 - Do you use it to buy food for yourself when in college/school (e.g. breakfast or lunch)?
 - Do you use it to buy clothes?
 - Do you use it for educational purposes, such as travel costs to college (bus/train tickets or personal costs of running a car), to buy books or equipment, or to fund extra-curricular activities?
 - Do you use it for social purposes such as going out?
 - Do you use it as a contribution towards household costs e.g. as rent to parents/guardians or to pay any household bills?

⁵ Paper based application forms were used until November 2023. Online applications used from November 2023 onwards. Very few online applications have been made to date.

- Do you use it to pay for food at home, or as a contribution towards household food costs?
 - Why do you use the allowance in this/these way(s)?
7. [For those also supported via the EMA during previous academic year 2022/23] The EMA was increased from £30 to £40 in April 2023. What difference did this make?
8. How important is the EMA to you?
- Is it an essential or nice to have contribution?
 - How does it help you to buy things you need?
9. For the past few years, the cost of essential items like food, gas and electric has been rising rapidly, putting financial pressure on families and households. How much of a role does EMA have in helping your family with rising costs?
10. What other financial support do you get?
- Do you receive free or subsidised transport to college/school?
 - Do you get free school meals or subsidised lunch at college?
 - [FE/sixth form only] Does your college offer any other financial support or help? If so, have you received this?

Learning agreements and monitoring attendance

11. Do you know what the EMA Learning Agreement is?
- What did the process of setting this up involve?
 - What level of attendance is required of you as part of your EMA Learning Agreement?
 - How much importance is attached to your EMA Learning Agreement by your school/college?
12. How is your attendance at school/college monitored?
- How is your attendance recorded (by teacher/tutor)?
 - How frequently is attendance monitored (e.g. every lesson, half day, daily)
 - What happens when you deliberately miss school or college? Does this affect your EMA payments?
 - Is attendance the best way of awarding the EMA allowance? If so, why do you say that / If not, how else could the EMA be awarded?

Difference made

13. How important was (the possibility of) receiving the EMA to your decision stay in education and enrol on the course?
- What other things influenced your decision to enrol on the course/continue in education?
 - Would you have enrolled on the course anyway?

- How likely are you to complete the course?
14. What difference (if any) does receiving the EMA have upon:
- your attendance at school/college?
 - how much you engage in lessons?
 - how much you engage with extra-curricular activities like school/college trips?
15. Does receiving the EMA mean you have more time to study outside school/college?
- Does it mean that you don't have to work in a paid job, or work fewer hours in a paid job?
 - [as appropriate] Does receiving £40 rather than the previous £30 allowance make any difference to the hours you now have to work whilst studying?
16. What difference do you expect receiving the EMA will have upon the grades/qualifications that you will achieve (or have achieved e.g. AS level, if relevant)?
17. Had you not received the EMA, what would have happened? For instance:
- Would you have had to find part-time work/increase the hours you work in a job?
 - Would you have gone without something (e.g. books) or opted out of trips?
 - (if applicable) What would have been the implications for your parents/guardians?

Views on the EMA Design

18. The EMA is made available in most cases to students from low income households⁶. Do you think that this is fair?
- Why do you say that?
 - Do you think that it's fair that students with brothers or sisters who are still in education can get the EMA if they come from a household with a slightly higher income? Why do you say that?
19. Do you think that the EMA is being used to support learners who need it most?
- Why do you say this?
 - Are there any learners who miss out on the EMA? Who? Why do they miss out e.g. don't know about it, not eligible/just miss out?

⁶ There are two different household income thresholds for eligibility, which are based on the student's family circumstances: (1) Student living in a household that has an annual income of £20,817 or less if the applicant is the only dependant, or (2) Students living in a household that has an annual income of £23,077 or less if there are other dependants in the household (dependants are 15 or under, or aged 16 to 20 and in full-time non-advanced education or training, and eligible for child benefit).

20. What do you think about the current amount of EMA which is £40 per week?
- Is this a lot, too little, or about right?
 - Should the allowance be reduced or increased? If so by how much?
21. Do your school/college friends know about the EMA?
- What do they think of it?
 - Is there any stigma attached to receiving it? By 'stigma' I mean a negative attitude or idea about a person because of their social circumstance. If so, how could this stigma be removed?

Future

22. How could the EMA be improved?
23. Can you think of a better way to support learners financially, rather than with EMA as it is now?
- If so, how?
 - How could those with care experience be better supported financially?
 - How could learners with ALN be better supported financially?
 - How could learners who are struggling to manage financially be better supported?
 - What other ways of providing financial help would also help you to continue with your education?

Discussion guide 3: Virtual focus group with EMA recipients with care experience

These questions will be asked of EMA recipients with care experience, currently in Years 12 and 13, studying at FE/sixth forms and schools.

Introduction

Thank you for attending this focus group. I am here on behalf of OB3 Research, as we are undertaking a review of the Education Maintenance Allowance (often referred to as the EMA) for the Welsh Government. As part of this review, we wish to talk to learners with care experience who receive the EMA. Young people with care experience are often under-represented in research which is why we are asking you specifically to share your views and experiences. We are also talking to other learners as well as parents, staff and other groups. The research will be used to write a report for the Welsh Government in the summer.

The areas I'd like to discuss with you today include:

- your experience of applying for the EMA
- how you are using the funds (it doesn't matter how you're using the funds, you could be using it for books and equipment or for going out, it is just important for us to know how it gets spent. There is no risk that you'll lose the EMA by sharing this information)
- the difference receiving the EMA made to your decision to continue in education and what would you have done without the support
- the difference receiving EMA is making to your attendance and performance

As part of this review we also have a short web survey which the Welsh Government have shared with young people. A link to this survey is in the Chat – if you haven't already completed this please do so.

Confirm that:

- You or your school/college will not be named, or be identifiable in any way in the published report
- I expect the discussion to take around an hour
- Please do not repeat what people say today beyond this group
- I will not be sharing what you said with anybody else, unless there is a risk of harm to you or someone else
- We offer a £10 voucher as a thank you for your time. This will be supplied to you as an e-voucher via email.
- {As appropriate} You may contribute in either Welsh or English.
- [If mixed language group, explain that you will summarise any Welsh language contributions made in English]
- Should you wish to make any comments in confidence please use the chat function to message me directly during or after the session.

Introductions

1. Briefly, ask attendees to introduce themselves e.g. name, whether they attend school or FEI, subject/courses being studied, whether they work part time as well as study

Hearing about and applying for the EMA

2. When did you first hear about the EMA?
 - Did you hear about it whilst in Year 11/at school or (as appropriate) on joining sixth form/college?
 - Did your local authority or care provider tell you about it?
 - Did you know that it was available to Year 12/13 learners in both school and FE settings?
 - Was it easy or difficult to find out more about it?
 - How, if at all, could the EMA be better promoted to those in care and (where appropriate) foster carers?
3. What did you think of the (paper based or online⁷) application process?
 - What was easy or difficult about the application process?
 - How easy or difficult was it to get hold of the necessary information⁸ to support your application?
 - Did you get any help to complete the application form (e.g. from school/college/carer provider)?
 - How could the application process have been made easier?
4. Did you already have a bank account, or did you have to set one up to receive the EMA?
 - Who else has access to your bank account?

Use of the EMA and its importance to you

5. What do you spend most of the EMA on?
 - Do you use it to buy food for yourself when in college/school (e.g. breakfast or lunch)?
 - Do you use it to buy clothes?
 - Do you use it for educational purposes, such as travel costs to college (bus/train tickets or personal costs of running a car), to buy books or equipment, or to fund extra-curricular activities?
 - Do you use it for social purposes such as going out?

⁷ Paper based application forms were used until November 2023. Online applications used from November 2023 onwards. Very few online applications have been made to date.

⁸ Note that those in care are exempt from the means testing process element of the EMA, so don't need to supply details for their household income.

- Do you use it as a contribution towards household costs e.g. as rent to parents/guardians or to pay any household bills?
 - Do you use it to pay for food at home, or as a contribution towards household food costs?
 - Why do you use the allowance in this/these way(s)?
6. [For those also supported via the EMA during previous academic year 2022/23] The EMA was increased from £30 to £40 in April 2023. What difference did this make?
7. How important is the EMA to you?
- Is it an essential or nice to have contribution?
 - How does it help you to buy things you need?
8. For the past few years, the cost of essential items like food, gas and electric has been rising rapidly, putting financial pressure on families and households. How much of a role does EMA have in helping you with rising costs?
9. What other financial support do you get?
- Do you receive free or subsidised transport to college/school?
 - Do you get free school meals or subsidised lunch at college?

Learning agreements and monitoring attendance

10. Do you know what the EMA Learning Agreement is? What are your views about it?
11. How is your attendance at school/college monitored?
- What happens when you deliberately miss school or college? Does this affect your EMA payments?
 - Is attendance the best way of awarding the EMA allowance? If so, why do you say that / If not, how else could the EMA be awarded?

Difference made

12. How important was (the possibility of) receiving the EMA to your decision to stay in education and enrol on the course?
- What other things influenced your decision to enrol on the course/continue in education?
 - Would you have enrolled on the course anyway?
How likely are you to complete the course?
13. What difference (if any) does receiving the EMA have upon:
- your attendance at school/college?
 - how much you engage in lessons?
 - how much you engage with extra-curricular activities like school/college trips?

14. Does receiving the EMA mean you have more time to study outside school/college?
 - Does it mean that you don't have to work in a paid job, or work fewer hours in a paid job?
 - [as appropriate] Does receiving £40 rather than the previous £30 allowance make any difference to the hours you now have to work whilst studying?
15. What difference do you expect receiving the EMA will have upon the grades/qualifications that you will achieve (or have achieved e.g. AS level, if relevant)?
16. Had you not received the EMA, what would have happened? For instance:
 - Would you have had to find part-time work/increase the hours you work in a job?
 - Would you have gone without something (e.g. books) or opted out of trips?

Views on the EMA Design

17. You'll be aware that those with care experience don't need to provide information about their household income to show that they live in a low income household, and automatically qualify for the EMA provided they meet the other criteria associated with the fund. Do you think that this is appropriate?
 - Why do you say that?
18. Do you think that the EMA is being used to support learners who need it most?
 - Why do you say this?
 - Are there any learners who miss out on the EMA? Why do they miss out e.g. not knowing about it, eligibility criteria?
19. What do you think about the current amount of EMA which is £40 per week?
 - Is this a lot, too little, or about right?
 - Should the allowance be reduced or increased? If so by how much?
20. Do your school/colleges friends know about the EMA?
 - What do they think of it?
 - Is there any stigma attached to receiving it? By 'stigma' I mean a negative attitude or idea about a person because of their social circumstance. If so, how could this stigma be removed?

Future

21. How could the EMA be improved?
22. Can you think of a better way to support learners financially, rather than with EMA as it is now?

- If so, how?
- How could learners with care experience be better supported financially?

Discussion guide 4: Focus group with Year 11 learners

These questions will be asked of Year 11 learners, currently studying at schools, who are likely to be eligible for EMA in Years 12 and 13 should they continue in education, be that at a school or college. Ideally, focus group attendees should include free school meal learners, those with care experience, student carers, those with ALN, and a mix in terms of learners in terms of future plans, including those who are likely/unlikely to study post-16 qualifications at school and/or college.

Introduction

Thank you for coming today. I work for OB3 Research, and we're reviewing the Education Maintenance Allowance (which you might have heard about and know as the EMA) for the Welsh Government. As part of this review, we want to get feedback from learners who might be eligible for the EMA. We are also talking to other learners as well as parents, staff and other groups of people. The research will be used to write a report for the Welsh Government in the summer.

The areas I'd like to discuss with you today include:

- your plans for the future
- whether you have heard of the EMA and have plans to apply for it
- the difference receiving the EMA would make to you and what might you do without the support

Confirm that:

- You or your school/college will not be named, or be identifiable in any way in the published report
- I expect the discussion to take 3/4 hour
- Please do not repeat what people say today beyond this group
- I will not be sharing what you said with anybody else, unless there is a risk of harm to you or someone else
- Please complete a short form to provide some basic information about yourself. This will only be used by us to report on the profile of students we talk to as part of this study.
- {As appropriate} You may contribute in either Welsh or English.
- [If mixed language group, explain that you will summarise any Welsh language contributions made in English]
- Should you wish to make any comments in confidence after the focus group then please do so after the session.

Year 11 Learners	
Name	
Name of school	
Do you receive free school meals?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you have experience of being in care?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you care for another family member?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you have any additional learning needs, such as a learning difficulty or disability, which makes it harder for you to learn?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you have a paid job?	<input type="checkbox"/> Yes <input type="checkbox"/> No
[If you do work] When do you usually work in this paid job? <i>Please tick all relevant options</i>	<input type="checkbox"/> In the week before/after school <input type="checkbox"/> On the weekend <input type="checkbox"/> During school holidays

Introductions

1. Briefly, ask attendees to introduce themselves e.g. name, subjects studied; whether they work part time as well as study
2. Do you know yet what your plans are for next year (i.e. academic year 2023/24)?
 - Are you considering staying in education? If so, are you considering staying on at school or studying at college?

Hearing about the EMA/financial support available

3. Do you know what financial support you might get next year if you stay on in education?
 - What support do you think you might get if you stay on at school?
 - What support do you think you might get if you study at a college?
4. Have you heard about the EMA? *[Please provide information about the EMA as appropriate to help learners respond to questions e.g. it's a £40 weekly allowance, to those from low-income household, paid if learners attend education be that at school or college. Learners have to apply for it and payment is made fortnightly]*
 - Who told you about it?
 - Have you had information about the EMA from the school, or from a nearby college? (If from college – was this during an open day visit or did a college representative come to the school to talk to you)
 - Did you know that you could get the EMA if studying at a school or college?
 - [Where relevant] How easy or difficult was it to find out more about it?
 - How, if at all, could the EMA be better promoted/advertised?
5. [If planning to stay on in education] Do you think you will apply for the EMA?
 - Do you think you will qualify for the EMA?

Importance of EMA to you

6. How important will it be for you to receive the EMA allowance during Years 12 and 13?
 - How do you think it will help you to be able to afford things you need?

Difference made

7. How important is the possibility of receiving the EMA to your decision to continue in education next year?
 - What other things will you consider when making a decision about staying in education?
 - Will you stay in education anyway, even if you don't receive the EMA?

8. Do you think that receiving the EMA next year will make it easier for you to go on field trips and do extracurricular activities?
 - Why do you say this?
9. Do you think that receiving the EMA allowance next year will mean that you have more time to study outside school/college?
 - Will it mean that you won't have to get (or stay in) a paid job, or work fewer hours in a paid job?
10. If you do receive the EMA next year, do you think you might use some or all of it to help your parents, such as to pay for food, household bills or as rent?
11. If you won't receive the EMA, what do you think you'll do? For instance:
 - Will you try to find work instead of staying on in education?
 - Will you choose a different course e.g. chose an apprenticeship, or choose school rather than college, or vice versa?
 - Will you find part-time work/increase the hours you work in a job?
 - Will you go without something (e.g. books) or opt out of trips?

Views on the EMA Design

12. You may be aware that the EMA is made available in most cases to students from low-income households. Do you think that this is fair?
 - Why do you say that?
13. What do you think about the current amount of EMA which is £40 per week?
 - Is this a lot, too little, or about right?
 - Should the allowance be reduced or increased? If so by how much?

Future

14. What support, including any financial support, would make it easier for you to stay in education?
 - How could those with care experience be better supported?
 - How could young carers be better supported?
 - How could learners with ALN be better supported?
 - How could learners who are struggling to manage financially be better supported?

Discussion guide 5: Focus group with non-EMA recipients

These questions will be asked of unsuccessful EMA applicants or learners who might be struggling financially at the moment and who in Years 12 and 13 and based at FEI/sixth forms.

Introduction

Thank you for attending this focus group. I am here on behalf of OB3 Research, as we are undertaking a review of the Education Maintenance Allowance (often referred to as the EMA) for the Welsh Government. As part of this review, we wish to obtain feedback from learners whose application to the EMA was unsuccessful or who are only marginally ineligible for support, in that their household income is just above the income threshold. We are also talking to other learners as well as parents, staff and other groups. The research will be used to write a report for the Welsh Government in the summer.

The areas I'd like to discuss with you today include:

- your experience of applying for the EMA (as appropriate)
- how not receiving EMA may have affected you, your studies and your attendance
- how you are paying for things without EMA support

Confirm that:

- You or your school/college will not be named, or be identifiable in any way in the published report
- I expect the discussion to take around an hour
- Please do not repeat what people say today beyond this group
- I will not be sharing what you said with anybody else, unless there is a risk of harm to you or someone else
- [FEI contributors only] We offer a £10 voucher as a thank you for your time.
- Please complete a short form to provide some basic information about yourself. This will only be used by us to report on the profile of learners we talk to as part of this study.
- {As appropriate} You may contribute in either Welsh or English.
- [If mixed language group, explain that you will summarise any Welsh language contributions made in English]
- Should you wish to make any comments in confidence after the focus group then please do so after the session.

Non-EMA Recipients Form	
Name	
Name of school / college	
Age	
What course or subjects are you currently studying?	
Do you receive any financial help or support:	<input type="checkbox"/> Free school or college meals <input type="checkbox"/> Free or subsidised school or college transport <input type="checkbox"/> Financial help from the college <input type="checkbox"/> Another type of financial help, please specify: <hr/> <input type="checkbox"/> No, none
Do you have experience of being in care?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you care for another family member?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you have any additional learning needs, such as a learning difficulty or disability, which makes it harder for you to learn?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you also have a paid job?	<input type="checkbox"/> Yes <input type="checkbox"/> No
[If you do work] When do you usually work in this paid job? <i>Please tick all relevant options</i>	<input type="checkbox"/> In the week (days and/or evenings) <input type="checkbox"/> On the weekend <input type="checkbox"/> During school or college holidays

Introductions

1. Briefly, ask attendees to introduce themselves e.g. name, subject/courses being studied; whether they work part time as well as study

Hearing about and applying for the EMA

2. Have you heard about the EMA?
 - [as appropriate] When did you first hear about the EMA?
 - [as appropriate] Who told you about it?
 - [as appropriate] Was it easy or difficult to find out more about it?
 - How, if at all, could the EMA be better promoted?
3. [as appropriate] Why did you apply for the EMA?
4. [as appropriate] What did you think of the (paper based or online⁹) application process?
 - What was easy or difficult about the application process?
 - How easy or difficult was it to get hold of the necessary information (e.g. details about household income) to support your application?
 - Did you get any help to complete the application form (e.g. from school/college/parents)?
 - How could the application process have been made easier?
5. [as appropriate] Do you remember why your application was unsuccessful?
 - What did you think of the decision at the time?

Paying for things

6. How do you pay for things such as:
 - food for yourself when in college/school (e.g. breakfast or lunch)?
 - clothes?
 - educational things, such as travel costs to college (bus/train tickets or personal costs of running a car), books or equipment, or extra-curricular activities?
 - social activities such as going out?
7. Do you help your parents financially?
 - Do you pay for food at home, or contribute towards household food costs?
 - Do you contribute towards household bills?
 - Do you pay rent to your parents?
8. What difference would receiving the EMA make to you?

⁹ Paper based application forms were used until November 2023. Online applications used from November 2023 onwards. Very few online applications have been made to date.

- Would it be an essential or nice-to-have contribution?
 - How would it help you buy things you need?
9. For the past few years, the cost of essential items like food, gas and electric has been rising rapidly, putting financial pressure on families and households. How much would EMA help you / your family with rising costs?
10. What other financial support to you get?
- Do you receive free or subsidised transport to college/school?
 - Do you get free school meals or subsidised lunch at college?
 - [FE/sixth form only] Does your college offer any other financial support or help? If so, have you received this?

Difference made

11. What difference, if any, did not being awarded the EMA make to your decision to stay in education?
- What other things influenced your decision to enrol on the course/continue in education?
 - How likely are you to complete the course?
12. What difference (if any) does not receiving the EMA have upon:
- your attendance at school/college?
 - how much you engage in lessons?
13. Do you think your attendance and engagement would be better if you received the EMA?
14. What difference (if any) does not receiving the EMA have upon how much you take part in field trips and extracurricular activities?
15. What difference do you think not receiving the EMA will have upon the grades/qualifications that you will achieve (or have achieved e.g. AS level, if relevant)?
16. Do you have to work in a paid job or work more hours in a paid job because you don't get the EMA?
17. Had you received the EMA, what would have happened? For instance:
- Would you still have to work, or work fewer hours in a job?
 - Would you have been able to afford things like books, equipment or trips?
 - What would have been the implications for your parents/guardians?

Views on the EMA Design

18. You'll be aware that the EMA is made available in most cases to students from low income households. Do you think that this is fair?
- Why do you say that?
 - Do you think that it's fair that students with brothers or sisters who are still in education can get the EMA if they come from a household with a slightly higher income? Why do you say that?
 - Do you think that the household income thresholds set for EMA are at the right levels?
19. Do you think that the EMA is being used to support learners who most need it?
- Why do you say this?
 - Are there any learners who miss out on the EMA? Why do they miss out e.g. not knowing about it, eligibility criteria?
20. What do you think about the current amount of EMA which is £40 per week?
- Is this a lot, too little, or about right?
 - Should the allowance be reduced or increased? If so by how much?
21. Do your school/college friends know about the EMA?
- What do they think of it?
 - Is there any stigma attached to receiving it? By 'stigma' I mean a negative attitude or idea about a person because of their social circumstance. If so, how could this stigma be removed?

Future

24. How could the EMA be improved?
25. Can you think of a better way to support learners financially, rather than with EMA as it is now?
- If so, how?
 - How could those with care experience be better supported financially?
 - How could young carers be better supported financially?
 - How could learners with ALN be better supported financially?
 - How could learners who are struggling to manage financially be better supported?
 - What other ways of providing financial help would also help you to continue with your education?

Discussion guide 6: Focus group with learners at schools and colleges in England

A mix of Years 12 and 13 learners can be interviewed during visits to English institutions, and could include:

- *English domiciled learners who are in Years 12 and 13 who would be eligible for EMA support should they be based in Wales i.e. they will come from low-income households. Naturally, this group will therefore include learners who are in receipt of the 16 to 19 Bursary Fund.*
- *Welsh domiciled learners who are in Years 12 and 13 but who are not in receipt of EMA support.*

These discussions could be held separately or on a combined basis, depending on the preference of the institution.

Introduction

Thank you for attending this focus group. I am here on behalf of OB3 Research, as we are undertaking a review of the EMA for the Welsh Government. As part of this review, we wish to obtain feedback from learners studying at English institutions to compare the support that is available to students who live in England or Wales. We are also talking to other learners as well as parents, staff and other groups. The research will be used to write a report for the Welsh Government in the summer.

I'd like to discuss with you today your views on the financial support that is available to you and how effective this support is.

Confirm that:

- You or your school/college will not be named, or be identifiable in any way in the published report
- I expect the discussion to take around an hour
- Please do not repeat what people say today beyond this group
- I will not be sharing what you said with anybody else, unless there is a risk of harm to you or someone else
- [FEI only] We offer a £10 voucher as a thank you for your time. Please complete a short form to acknowledge receipt of this. This form also asks you to provide some basic information about yourself. This will only be used by us to report on the profile of learners we talk to as part of this study.
- Should you wish to make any comments in confidence after the focus group then please do so after the session.

Learners at schools and colleges in England	
Name	
Name of school / college	
Age	
What course or subjects are you currently studying?	
Do you receive any financial help or support: <i>Please tick all relevant options</i>	<input type="checkbox"/> Free school or college meals <input type="checkbox"/> Free or subsidised school or college transport <input type="checkbox"/> Financial help from the school/college <input type="checkbox"/> Another type of financial help, please specify: <hr/> <input type="checkbox"/> No, none
Do you have experience of being in care?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you care for another family member?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you have any additional learning needs, such as a learning difficulty or disability, which makes it harder for you to learn?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you have a paid job?	<input type="checkbox"/> Yes <input type="checkbox"/> No
[If you do work] When do you usually work in this paid job? <i>Please tick all relevant options</i>	<input type="checkbox"/> In the week (days and/or evenings) <input type="checkbox"/> On the weekend <input type="checkbox"/> During school or college holidays

Introductions

1. Briefly, ask attendees to introduce themselves e.g. name, subject/courses being studied; whether they work part time as well as study
 - Do you live in England or Wales?

Students living in England - Student finance accessed

2. What financial support (if any) do you get?
 - Do you get free or subsidised transport to college/school?
 - Do you get free school meals or subsidised lunch at college?
 - Do you receive the 16 to 19 Bursary Fund?
 - Do you receive any other grants or loan support?
3. [As relevant] Why do you receive the Bursary Fund?
 - Do you receive it because you are in or recently left care, financially support yourself, or get allowances such as Disability Living Allowance or Universal Credit¹⁰?
 - Do you receive it as a bursary from your school/college?
4. [As relevant] What did you think of the Bursary Fund application process?
 - How easy or otherwise was it to hear more about the Bursary Fund?
 - How easy or otherwise was it to apply for the Bursary Fund?

Students living in Wales - hearing about and applying for the EMA

5. Have you heard of the EMA?
 - [as appropriate] When did you first hear about the EMA?
 - [as appropriate] Who told you about it?
 - [as appropriate] Was it easy or difficult to find out more about it?

Funding their studies

6. How are you Paying for:
 - food for yourself when in college/school (e.g. breakfast or lunch)?
 - clothes?

¹⁰ Vulnerable groups qualify for the bursary automatically. The four vulnerable groups are:

- you're in or you recently left local authority care
- you get Income Support or Universal Credit because you're financially supporting yourself
- you get Disability Living Allowance (DLA) in your name and either Employment and Support Allowance (ESA) or Universal Credit
- you get Personal Independence Payment (PIP) in your name and either ESA or Universal Credit

- educational things, such as travel costs to college (bus/train tickets or personal costs of running a car), books or equipment, or extra-curricular activities?
 - social activities such as going out?
7. Do you help your parents financially?
- Do you pay for food at home, or contribute towards household food costs?
 - Do you contribute towards household bills?
 - Do you pay rent to your parents?
8. What difference does any financial support received make to you?
- Is it an essential or nice to have contribution?
 - How does it help you to buy things you need?
9. For the past few years the cost of essential items like food, gas and electric has been rising rapidly, putting financial pressure on families and households. How much of a role does any financial support received have in helping your family with rising costs?
10. [For students living in Wales] What difference would receiving the EMA allowance make to you?
- Would it be an essential or nice to have contribution?
 - How would it help you to buy things you need?

Difference made

11. What difference, if any, did (not) receiving any financial support (inc. the EMA for Welsh domiciled learners) make to your decision to stay in education?
- What other things influenced your decision to enrol on the course/continue in education?
 - How likely are you to complete the course?
12. What difference (if any) does (not) receiving any financial support (inc. the EMA for Welsh domiciled learners) have upon your:
- attendance at school/college?
 - how much you engage in lessons?
13. Do you think your attendance and engagement would be better if you received the EMA?
14. What difference (if any) does (not) receiving financial support (inc. the EMA for Welsh domiciled learners) have upon how much you engage in field trips and extracurricular activities?
15. What difference do you think (not) receiving financial support (inc. the EMA for Welsh domiciled learners) will have upon the grades/qualifications that you will achieve (or

have achieved if relevant)?

16. What difference (if any) does (not) receiving any financial support (inc. the EMA for Welsh domiciled learners) have upon the amount of part-time work you do?
17. Had you (not) received any financial support, what would have happened? For instance:
 - Would you work, or work fewer/more hours in a job?
 - Would you have been able to afford (more) additional things like books, equipment or trips?
 - What would have been the implications for your parents/guardians?

Students living in England - views on the design of the Bursary Fund

18. You might know that the 16-19 Bursary Fund is available for certain groups¹¹ as well as bursaries which colleges/schools can choose to award based on their own policies. Do you think that this is fair?
 - Why do you say that?
 - What works well / not so well?
 - What changes, if any, should be made?
19. Do you think that the financial support available to students living in England is being used to support learners who need it most?
 - Why do you say this?
 - Are there any learners who miss out? Why do they miss out e.g. not knowing about it, eligibility criteria?
20. What do you think about the current amount awarded to students via the Bursary Fund
 - Is this a lot, too little, or about right?
 - Should the amount be reduced or increased? If so how?
21. How is the Bursary Fund viewed by learners generally?
 - How do learners not receiving the fund view it?
 - Is there any stigmatisation in receiving it? By 'stigma' I mean a negative attitude or idea about a person because of their social circumstance

Students living in Wales - views on the design of the EMA

¹¹ Those in care; care leavers; receiving Income Support (IS), or Universal Credit (UC) because they are financially supporting themselves or financially supporting themselves and someone who is dependent on them and living with them, such as a child or partner; and those receiving Disability Living Allowance (DLA) or Personal Independence Payments (PIP) in their own right as well as Employment and Support Allowance (ESA) or UC in their own right

22. The EMA is made available in most cases to students from low-income households¹². Do you think that this is fair?
- Why do you say that?
 - Are the current household income thresholds set appropriate?
 - Do you think that it's fair that students with brothers or sisters who are still in education can get the EMA if they come from a household with a slightly higher income? Why do you say that?
23. Do you think that the EMA is being used to support learners who need it the most?
- Why do you say this?
 - Are there any learners who miss out on the EMA? Why do they miss out e.g. not knowing about it, eligibility criteria?
24. What do you think about the current amount of EMA which is £40 per week?
- Is this a lot, too little, or about right?
 - Should the allowance be reduced or increased? If so by how much?
26. Do your school/college friends know about the EMA?
- What do they think of it?
 - Is there any stigma attached to receiving it? By 'stigma' I mean a negative attitude or idea about a person because of their social circumstance. If so, how could this stigma be removed?
25. What, if anything, needs to change about the EMA in the future?

¹² There are two different household income thresholds for eligibility, which are based on the student's family circumstances: (1) Student living in a household that has an annual income of £20,817 or less if the applicant is the only dependant, or (2) Students living in a household that has an annual income of £23,077 or less if there are other dependants in the household (dependants are 15 or under, or aged 16 to 20 and in full-time non-advanced education or training, and eligible for child benefit).

Discussion guide 7: Interviews with previous EMA recipients

These questions will be asked of previous EMA recipients.

Introduction

Thank you for being prepared to contribute to this review. I represent OB3 Research, who are undertaking a review of the Education Maintenance Allowance (often referred to as the EMA) for the Welsh Government. As part of this review, we wish to obtain feedback from learners who previously received the EMA. We are also talking to current learners as well as parents, staff and other groups. The research will be used to write a report for the Welsh Government in the summer.

The areas I'd like to discuss with you today include your views on:

- your experience of applying for the EMA
- how you used the funding during your course (it doesn't matter how you used the funds, you could have used it for books and equipment or for going out, it is just important for us to know how it was spent. There is no risk for you in sharing this information)
- the difference receiving the EMA made to your decision to continue in education and what would you have done had you not received the EMA
- the difference receiving the EMA made to your attendance and further education achievements
- how the EMA should be changed in the future.

Confirm that:

- You or your previous school/college will not be named, or be identifiable in any way in the published report
- I expect the discussion to take 20 minutes
- I'm happy to conduct the interview in either Welsh or English
- We offer a £10 voucher as a thank you for your time.

Introductions

1. Ask and code the following information

Name	
Which school or college did you attend?	
What course or subjects did you study whilst in receipt of EMA?	
In addition to the EMA did you receive any other financial help or support during your FE studies?	<input type="checkbox"/> Free school/college meals <input type="checkbox"/> Free or subsidised school/college transport <input type="checkbox"/> Financial help from your school or college <input type="checkbox"/> Another type of financial help -please specify _____ <input type="checkbox"/> None <input type="checkbox"/> Don't know / Can't remember
How old are you now?	
Do you have experience of being in care?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Did you care for another family member whilst in FE?	
Do/Did you have any Additional Learning Needs such as a learning difficulty or disability which makes/made it harder for you to learn?	<input type="checkbox"/> Yes <input type="checkbox"/> No

Hearing about and applying for the EMA

2. When did you first hear about the EMA?
 - Who told you about it?
 - Was it easy or difficult to find out more about it?
 - How, if at all, could the EMA be better promoted?
3. Why did you apply for the EMA?
 - For how many years did you receive the EMA?
4. What did you think of the (paper based) application process?
 - What was easy or difficult about the application process?

- How easy or difficult was it to get hold of the necessary information (e.g. details about household income) to support your application?
 - Did you get any help to complete the application form (e.g. from school/college/parents)?
 - How could the application process have been made easier?
5. Did you already have a bank account, or did you have to set one up to receive the EMA?
- Who else had access to your bank account?

Use of the EMA and its importance to you

6. How did you spend most of the EMA on?
- Did you use it to buy food for yourself when in college/school (e.g. breakfast or lunch)?
 - Did you use it to buy clothes?
 - Did you use it for educational purposes, such as travel costs to college (bus/train tickets or personal costs of running a car), to buy books or equipment, or to fund extra-curricular activities?
 - Did you use it for social purposes such as going out?
 - Did you use it as a contribution towards household costs e.g. as rent to parents/guardians or to pay any household bills?
 - Did you use it to pay for food at home, or as a contribution towards household food costs?
 - Why did you use the allowance in this/these way(s)?
7. How important was the EMA to you?
- Was it an essential or nice to have contribution?
 - How did it help you to buy things you needed?
8. For the past few years, the cost of essential items like food, gas and electric has been rising rapidly, putting financial pressure on families and households. How much of a role did EMA have in helping your family with rising costs?

Learning agreements and monitoring attendance

9. Do you remember what the EMA Learning Agreement was?
- What did the process of setting this up involve?
 - What level of attendance was required of you as part of the Learning Agreement?
 - How much importance was attached to the Learning Agreement by your school/college?
 - What impact did Covid have upon the Learning Agreement?

10. How was your attendance at school/college monitored?
- How was your attendance recorded (by teacher/tutor)?
 - How frequently was attendance monitored (e.g. every lesson, half day, daily)
 - What happened when you deliberately missed school or college? Did this affect your EMA payments?
 - What impact did Covid have upon how your attendance was monitored?
 - Is attendance the best way of awarding the EMA allowance? If so, why do you say that / If not, how else could the EMA be awarded?

Difference made

Question	Response	Comments
How important was (the possibility of) receiving the EMA to your decision to stay in education?	<input type="checkbox"/> Very important <input type="checkbox"/> Fairly important <input type="checkbox"/> Neither important nor not important <input type="checkbox"/> Not particularly important <input type="checkbox"/> Not at all important <input type="checkbox"/> Don't know / Can't remember	
What other things influenced your decision to enrol on the course/continue in education?		
Had you not received the EMA would you have stayed in education anyway?	<input type="checkbox"/> Yes, definitely <input type="checkbox"/> Yes, probably <input type="checkbox"/> Neither <input type="checkbox"/> No, probably not <input type="checkbox"/> No, definitely not <input type="checkbox"/> Don't know / Can't remember	
Had you not received the EMA would you have completed the course anyway?	<input type="checkbox"/> Yes, definitely <input type="checkbox"/> Yes, probably <input type="checkbox"/> Neither <input type="checkbox"/> No, probably not <input type="checkbox"/> No, definitely not <input type="checkbox"/> Don't know / Can't remember	
Was your attendance at school/college better because you received the EMA?	<input type="checkbox"/> Yes, much better <input type="checkbox"/> Yes, a little better <input type="checkbox"/> No difference	

	<input type="checkbox"/> Don't know / Can't remember	
Were you more engaged in lessons because you received the EMA?	<input type="checkbox"/> Yes, much more engaged <input type="checkbox"/> Yes, a little more engaged <input type="checkbox"/> No difference <input type="checkbox"/> Don't know / Can't remember	
Were you more engaged with extra-curricular activities like trips because you received the EMA?	<input type="checkbox"/> Yes, much more engaged <input type="checkbox"/> Yes, a little more engaged <input type="checkbox"/> No difference <input type="checkbox"/> Don't know / Can't remember	
Did you get better grades/qualifications because you received the EMA?	<input type="checkbox"/> Yes, much better <input type="checkbox"/> Yes, a little better <input type="checkbox"/> No difference <input type="checkbox"/> Don't know / Can't remember	
Did you have more time to study outside school/college because you received the EMA?	<input type="checkbox"/> Yes, much more time <input type="checkbox"/> Yes, a little more time <input type="checkbox"/> No difference <input type="checkbox"/> Don't know / Can't remember	
Did you have to work fewer hours (or not work at all) in paid employment because you received the EMA?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't know / Can't remember	

11. Had you not received the EMA, what would have happened? For instance:
- Would you still have been able to complete the course?
 - Would you have had to find part-time work/increase the hours you work in a job?
 - Would you have gone without something (e.g. books) or opted out of trips?
 - What would have been the implications for your parents/guardians?

What interviewee is doing now

12. What have you done since completing your FE studies?
13. What are you currently doing in terms of work or study?

14. What difference, if any, did receiving the EMA make to your current education/work situation?

Views on the EMA Design

15. You'll be aware that the EMA is made available in most cases to students from low-income households¹³. Do you think that this is fair?
- Why do you say that?
 - Do you think that it's fair that students with brothers or sisters who are still in education can get the EMA if they come from a household with a slightly higher income? Why do you say that?
16. Do you think that the EMA was used to support learners who needed it the most whilst you were in school/college?
- Why do you say this?
 - Were there any learners who missed out on the EMA? Why did they miss out e.g. not knowing about it, eligibility criteria?

Future

17. How could the EMA be improved?
18. Can you think of a better way to support learners financially, rather than with EMA as it is now?
- If so, how?
 - How could those with care experience be better supported financially?
 - How could young carers be better supported financially?
 - How could learners with ALN be better supported financially?
 - How could learners who are struggling to manage financially be better supported?

¹³ There are two different household income thresholds for eligibility, which are based on the student's family circumstances: (1) Student living in a household that has an annual income of £20,817 or less if the applicant is the only dependant, or (2) Students living in a household that has an annual income of £23,077 or less if there are other dependants in the household (dependents are 15 or under, or aged 16 to 20 and in full-time non-advanced education or training, and eligible for child benefit).

Discussion guide 8: Interviews with parents/guardians of current EMA recipients

These questions will be asked of parents/guardians with children currently in Years 12 and 13 and receiving the EMA. The intention is to speak with as many parents/guardians with children who have ALN as possible

Introduction

Thank you for being prepared to contribute to this review. I represent OB3 Research, who are undertaking a review of the Education Maintenance Allowance (often referred to as the EMA) for the Welsh Government. As part of this review, we wish to obtain feedback from parents and guardians whose child is currently receiving the EMA. We are particularly interested in hearing about the experiences of learners with ALN. We are also talking to learners, staff and other groups. The research will be used to write a report for the Welsh Government in the summer.

The areas I'd like to discuss with you today include:

- your experience of supporting your child to apply for the EMA
- how your child is using the funding during their course (it doesn't matter how they're using the funds, they could be using it for books and equipment or for going out, it is just important for us to know how it gets spent. There is no risk that they'll lose the EMA by providing this information)
- the difference receiving the EMA made to your child's decision to continue in education and what they would have done in the absence of the support
- the difference receiving the EMA makes to attendance and further education achievements
- how the EMA should be changed or modified in the future.

Confirm that:

- I'm happy to conduct the interview in either Welsh or English
- You, your child or the school/college at which your child attends will not be named, or be identifiable in any way in the published report
- I expect the discussion to take 20 minutes

Introductions

1. Ask and code the following information

Name of parent/guardian/foster carer	
Which school or college does learner(s) who are in receipt of EMA attend	
What course or subjects does learner(s) study whilst in receipt of EMA	
Do you have any other children living at home who are in education?	
How many adults live in the household?	
In addition to the EMA does your child receive any other financial help or support?	<input type="checkbox"/> None <input type="checkbox"/> Free school/college meals <input type="checkbox"/> Free or subsidised school/college transport <input type="checkbox"/> Financial help from the college or schools <input type="checkbox"/> Other type of support. please specify <hr/>
How old is learner(s) now?	
Does learner have experience of being in care?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Does learner care for another family member?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Does learner have any Additional Learning Needs, such as a learning difficulty or disability, which makes it harder for them to learn?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do any members of the household receive any benefits or financial support, because they are unable to work or caring for someone. What type of benefits do these members receive?	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, ask whether these are: <input type="checkbox"/> benefits associated with looking for work e.g. Universal Credit <input type="checkbox"/> benefits because they are unable to work <input type="checkbox"/> benefits associated with looking after children, such as Child Benefit <input type="checkbox"/> benefits associated with a disability or health condition <input type="checkbox"/> benefits associated with caring for someone, such as a Carer's Allowance

Hearing about and applying for the EMA

2. When did you/your child first hear about the EMA?
 - Who informed you/your child about it?
 - Was it easy or difficult to find out more about it?
 - How, if at all, could the EMA be better promoted?
3. Why did you/your child apply for the EMA?
 - Since when has your child been receiving the allowance?
4. What did you think of the (paper based or online¹⁴) application process?
 - What was easy or difficult about the application process?
 - How easy or difficult was it to provide the necessary information (e.g. details about household income) to support your child's application?
 - Did you/your child get any help to complete the application form (e.g. from school/college)?
 - How could the application process have been made easier?
5. Did your child already have a bank account, or did they have to set one up to receive the EMA?

Use of the EMA and its importance to your child

6. Do you know what your child spends the EMA on? If so, on what does your child spend most of the EMA on?
 - Do they use it to buy food for themselves when in college/school (e.g. breakfast or lunch)?
 - Do they use it to buy clothes?
 - Do they use it for educational purposes, such as travel costs to college (bus/train tickets or personal costs of running a car), to buy books or equipment, or to fund extra-curricular activities?
 - Do they use it for social purposes such as going out?
 - Do they use it as a contribution towards household costs e.g. as rent to parents/guardians or to pay any household bills?
 - Do they use it to pay for food at home, or as a contribution towards household food costs?
 - Why do they use the allowance in this/these way(s)?
7. [For those also supported via the EMA during previous academic year 2022/23] The EMA was increased from £30 to £40 in April 2023. What difference did this make?

¹⁴ Paper based application forms were used until November 2023. Online applications used from November 2023 onwards. Very few online applications have been made to date.

8. How important is the EMA allowance to you/your child?
 - Is it an essential or nice to have contribution?
 - How does it help you/your child to buy things you/they need?
9. For the past few years, the cost of essential items like food, gas and electric has been rising rapidly, putting financial pressure on families and households. How much of a role does EMA have in helping your family with rising costs?

Learning agreements and monitoring attendance

10. Do you know what the EMA Learning Agreement is?
 - What are your views on this?
 - What level of attendance is required from your child as part of the Learning Agreement?
 - How much importance is attached to the Learning Agreement by your child's school/college?
27. How is your child's attendance at school/college monitored?
 - How is their attendance recorded (by teacher/tutor)?
 - How frequently is attendance monitored (e.g. every lesson, half day, daily)
 - What happens when your child deliberately misses school or college? Does this affect their EMA payments?
 - Is attendance the best way of awarding the EMA allowance? If so, why do you say that / If not, how else could the EMA be awarded?

Difference made

Question	Response	Comments
How important was (the possibility of) receiving the EMA to your child's decision to stay in education?	<input type="checkbox"/> Very important <input type="checkbox"/> Fairly important <input type="checkbox"/> Neither important or not important <input type="checkbox"/> Not particularly important <input type="checkbox"/> Not at all important <input type="checkbox"/> Don't know	
What other things influenced your child's decision to enrol on the course/continue in education?		
Had your child not received the EMA would they have stayed in education anyway?	<input type="checkbox"/> Yes definitely <input type="checkbox"/> Yes probably <input type="checkbox"/> Neither <input type="checkbox"/> No probably not	

	<input type="checkbox"/> No definitely not <input type="checkbox"/> Don't know	
Had your child not received the EMA would they be likely to complete the course anyway?	<input type="checkbox"/> Yes definitely <input type="checkbox"/> Yes probably <input type="checkbox"/> Neither <input type="checkbox"/> No probably not <input type="checkbox"/> No definitely not <input type="checkbox"/> Don't know	
Does receiving the EMA help your child to attend school or college on a more regular basis?	<input type="checkbox"/> Significant difference <input type="checkbox"/> A little difference <input type="checkbox"/> No difference <input type="checkbox"/> Don't know	
Does receiving the EMA mean that your child is more engaged in lessons	<input type="checkbox"/> Yes definitely <input type="checkbox"/> Yes probably <input type="checkbox"/> Neither <input type="checkbox"/> No probably not <input type="checkbox"/> No definitely not <input type="checkbox"/> Don't know	
Does receiving the EMA mean that your child is more able to engage in activities such as field trips and extracurricular?	<input type="checkbox"/> Yes definitely <input type="checkbox"/> Yes probably <input type="checkbox"/> Neither <input type="checkbox"/> No probably not <input type="checkbox"/> No definitely not <input type="checkbox"/> Don't know	
Does receiving the EMA make any difference to the grades/qualifications your child is likely to achieve	<input type="checkbox"/> Significant difference <input type="checkbox"/> A little difference <input type="checkbox"/> No difference <input type="checkbox"/> Don't know	
Does receiving the EMA mean that your child has more time to study outside school/college?	<input type="checkbox"/> Yes definitely <input type="checkbox"/> Yes probably <input type="checkbox"/> Neither <input type="checkbox"/> No probably not <input type="checkbox"/> No definitely not <input type="checkbox"/> Don't know <input type="checkbox"/> Not relevant - doesn't work	

28. Had you/your child not received the EMA, what would have happened? For instance:
- Would they have had to find part-time work/increase the hours they work in a job?
 - Would they have gone without something (e.g. books) or opted out of trips?
 - What would have been the implications for you as parents/guardians?

Views on the EMA Design

29. You'll be aware that the EMA is made available in most cases to students from low-income households. Do you think that this is fair?
- Why do you say that?
 - Are the current household income thresholds set for EMA appropriate?
 - If not, where do you think they should be pitched?
 - Do you think that it's fair that students with brothers or sisters who are still in education can get the EMA if they come from a household with a slightly higher income? Why do you say that?
30. Do you think that the EMA is being used to support learners who need it the most?
- Why do you say this?
 - Are there any learners who miss out on the EMA? Why do they miss out e.g. not knowing about it, eligibility criteria?
31. What do you think about the current amount of EMA which is £40 per week?
- Is this a lot, too little, or about right?
 - Should the allowance be reduced or increased? If so by how much?

Future

32. How could the EMA be improved?
33. Can you think of a better way to support learners financially, rather than with EMA as it is now?
- If so, how?
 - How could those with care experience be better supported financially?
 - How could young carers be better supported financially?
 - How could learners with ALN be better supported financially?
 - How could learners who are struggling to manage financially be better supported?
 - What other ways of providing financial help could be explored that would also help your child to continue with their education?

Discussion guide 9: Interviews with Learning Centres

These questions will be asked of Head of Sixth Forms at schools and Head of Student Support Services at FEIs.

Introduction

1. Tell me about your involvement with post-16 student finance, including the EMA

Policy, rationale and need for EMA

2. What do you understand to be the aims and objectives of the EMA?
 - How, if at all, have these objectives changed over time?
3. To what extent is there a need for EMA?
 - Why do you say this?
 - What evidence do you have about the current financial barriers facing young people from low-income families to stay in formal education?
 - How has the need for EMA changed in light of recent cost-of-living pressures?
 - What are the other barriers to engaging in further study?
4. What other statutory and discretionary student support provision are available in Wales to support post-16 learners?
 - How does EMA fit with these?
 - How does EMA align with the Financial Contingency Fund (FCF) available to FEI learners?
 - How is any additional funding provided to FEIs to support learners during the cost-of-living crisis being utilised?
 - How does EMA align with subsidised provision such as free/subsidised transport and free school meals?
 - How much overlap is there in terms of learners accessing EMA and these other subsidised provisions?
5. What other schemes targeting similar cohorts are available e.g. Jobs Growth Wales+?
 - How does EMA compare with these in terms of eligibility, the financial offer and implementation?
 - What works well/not as well with these schemes?

EMA design

6. How appropriate is it that the EMA is made available to learners on the basis of household means testing?

- What are your views on the eligibility thresholds¹⁵ (which have remained unchanged since 2011/12)?
 - What are your views about the consideration of other dependants in the household?
 - What changes, if any, should be considered to these thresholds?
 - What other eligibility model should be considered? Why do you say this?
 - How appropriate is it that the funding is paid directly to the learner rather than parent/carer?
7. Do you think the profile of EMA recipients has changed over time? If so, what accounts for this?
- In terms of age?
 - In terms of eligible courses?
 - In terms of setting (FEI/school)? Why do you think the proportion of recipients based at FEIs has increased over time?
 - In terms of rural/urban split?
8. Do you think the EMA is supporting students who are most in need? Why do you say this?
- Are any students missing out on EMA? If so, which type of students are these?
9. How appropriate is the current EMA allowance level of £40 per week¹⁶?
- Should this be revised at all?
 - How could an appropriate allowance level be determined on an ongoing basis in the future?
10. How appropriate are the ‘full exemption categories’ for EMA¹⁷?
- Why do you say this? Are there any gaps in the categories used?

EMA administration

11. What does the EMA application involve from a learners’ perspective?

¹⁵ Student living in a household that has an annual income of £20,817 or less if the applicant is the only dependant, or students living in a household that has an annual income of £23,077 or less if there are other dependants in the household (dependants are 15 or under or aged 16 to 20 and in full-time non-advanced education or training, and eligible for child benefit).

¹⁶ In April 2023, the allowance was increased to £40 for the two forthcoming academic years

¹⁷ “exempt person” means a person who is—

(a) in local authority care, with foster parents or is a care leaver,
 (b) responsible for a child of their own, (c) in receipt of Income Support or Income based Employment and Support Allowance,
 (d) entitled to an award of universal credit under the Universal Credit Regulations 2013, or
 (e) in custody or detention within the youth justice system including a Young Offenders Institution, Secure Training Centre or Secure Children’s Home;

- What are the benefits for learners (and parents/guardians) of introducing an electronic-based application for EMA?
 - What are the challenges / disadvantages for learners?
12. What evidence do you have about the impact of increasing the weekly allowance (which was increased from £30 to £40 in April 2023 to help learners with the reality of the cost of studying)?
- Has there been any change in the numbers of students at the Learning Centre applying/receiving the EMA?
 - Are learners any more likely to enrol at the Learning Centre as a result of the uplift?
 - Are learners any more likely to engage more with their education as a result of the uplift?
13. What changes have been made to the EMA implementation over the last few years?
- What impact have these changes to the EMA had?
14. How does the Learning Centre publicise and communicate the EMA to learners and parents?
- Is the EMA promoted widely or is it targeted at particular cohorts of learners?
 - How do colleges promote the EMA to Year 11 school pupils (particularly within schools which have sixth forms who will be trying to retain students)?
 - How effective are these methods?
 - What works well?
 - How could the promotion of the EMA be improved?
15. How does the Learning Centre administer the Learning Agreements?
- What steps do Learning Centres adopt to monitor these?
 - What ongoing impact, if any, did the COVID-19 pandemic have upon the administration of Learning Agreements e.g. have you merged the EMA agreement into own school or college agreement; do you administer the agreement electronically; or do you still use paper versions?
 - How effective is the use of Learning Agreements?
 - Do students value the Learning Agreements? If not, why not? If they do, what do they value about them?
16. What monitoring data do Learning Centres collect about EMA recipients engagement and attendance?
- How appropriate is attendance as a performance measure?
 - Are attendance incentives working?
 - What other measures could be used/are gathered by Learning Centres e.g. completion of coursework, contribution in work/lessons, behaviour etc

- Are the discretionary arrangements introduced in response to the Covid-19 pandemics (whereby Learning Centres operated and maintained their own attendance policies) still being applied?

17. What impact did COVID have upon the use of Learning Agreements and the monitoring of attendance?

- To what extent have these practices continued post COVID?

Difference made

18. What evidence do you have about the value which is attached to the EMA amongst learners?

- What evidence do you have that it's an essential or a nice-to-have contribution?
- What evidence do you have that its helping to overcome increased costs of living?
- What evidence do you have that its helping to alleviate food hardship?
- What evidence do you have about the way learners are using the EMA?

19. What evidence do you have about the impact which the EMA is having upon:

- Learners' decision to enrol on courses and stay in post 16 education?
- Learners' attendance and engagement at school or college?
- Learners' ability to engage in activities such as field trips and extracurricular activities?
- Learners' grades and qualifications achieved?
- Learners' engagement in part-time paid work?

20. What evidence do you have about any differences in attendance and engagement between EMA recipients and non-EMA recipients? For instance:

- How do attendance rates of EMA recipients compare with non-EMA recipients?

Future

21. Should the WG continue to financially support post-16 learners directly in the future?

- If not, why not and what alternative approach, if any, would you suggest?
- If so, how should this financial support be made available?
- On what basis should learners receive financial support (e.g. household income, attendance, for specific provisions)?

22. Could the WG use its EMA funds in a more effective way?

- If so, how?
- How could the EMA (or equivalent) better target financial support towards those in greatest need?

- How could those in care / care leavers / students carers be most effectively supported?
 - How could learners with ALN be most effectively supported?
 - How could students from the most deprived backgrounds be supported?
 - What other ways of providing financial help could be explored that would also help learners to continue with their education?
23. How might the effectiveness and impact of the EMA (or equivalent) be reviewed on an ongoing basis in the future?
- What steps/processes could be adopted?

Discussion guide 10: Interviews with key stakeholders

These questions will be used for interviewing key stakeholders such as NUS Cymru, Estyn, Colegau Cymru, CTER, Careers Wales, and Children's Commissioner for Wales. Questions will be tailored according to contributors' role and involvement with the EMA and not all questions will be posed of all contributors.

Introduction

1. Tell me about your role and involvement with post-16 student finance/student support, including the EMA

Policy, rationale and need for EMA

2. What do you understand to be the aims and objectives of the EMA?
 - How, if at all, have these objectives changed over time?
3. How is the EMA expected to contribute towards Welsh Government policy and strategy?
 - Which key policies and strategies does it contribute towards?
 - How well aligned is the EMA with the Wellbeing and Future Generations Act?
 - How does the EMA support Cymraeg 2050: A Million Welsh Speakers?
4. To what extent is there a need for EMA?
 - Why do you say this?
 - What evidence do you have about the current financial barriers facing young people from low-income families to stay in formal education?
 - How has the need for EMA changed in light of recent cost-of-living pressures?
5. What other statutory and discretionary student support provision are available in Wales to support post-16 learners?
 - How does EMA fit with these?
 - How does EMA align with the Financial Contingency Fund (FCF) available to FEI learners?
 - How was any additional funding provided to FEIs to support learners during the cost-of-living crisis utilised?
 - How does EMA align with subsidised provision such as free transport and free school meals?
 - How much overlap is there in terms of learners accessing EMA and these other subsidised provisions?
6. What other schemes targeting similar cohorts are available e.g. Jobs Growth Wales+?
 - How does EMA compare with these in terms of eligibility, the financial offer and implementation?
 - What works well/not as well with these schemes?

7. How does EMA compare with the provision of financial support to post-16 students in other parts of the UK?
- What are the main differences in eligibility criteria between Wales and other devolved nations?
 - What are the advantages and disadvantages of the EMA?

EMA design

8. How appropriate is it that the EMA is made available to learners on the basis of household means testing?
- What are your views on the eligibility thresholds¹⁸ (which have remained unchanged since 2011/12)
 - What are your views about the consideration of other dependants in the household?
 - What changes, if any, should be considered to these thresholds?
 - What other eligibility model should be considered? Why do you say this?
 - How appropriate is it that the funding is paid directly to the learner rather than parent/carer?
9. Do you think the profile of EMA recipients has changed over time? If so what accounts for this?
- In terms of age?
 - In terms of eligible courses?
 - In terms of setting (FEI/school)? Why do you think the proportion of recipients based at FEIs has increased over time?
 - In terms of rural/urban split?
 - Do you think the EMA is supporting students who are most in need? Why do you say this?
10. How appropriate is the current EMA allowance level of £40 per week¹⁹?
- Should this be revised at all?
 - How could an appropriate allowance level be determined on an ongoing basis in the future?

EMA administration

11. What are your views about any key changes made to the EMA (in terms of eligibility criteria and implementation) over the last few years?

¹⁸ Student living in a household that has an annual income of £20,817 or less if the applicant is the only dependant, or students living in a household that has an annual income of £23,077 or less if there are other dependants in the household (dependants are 15 or under or aged 16 to 20 and in full-time non-advanced education or training, and eligible for child benefit).

¹⁹ In April 2023, the allowance was increased to £40 for the two forthcoming academic years

- What are your views about the introduction of electronic applications made in late 2023?
12. What are your views about the way the EMA is publicised and communicated to learners and parents?
 - How effective are these methods?
 - What works well?
 - How could the promotion of the EMA be improved?
 13. What are your views on the way Learning Agreements are administered by Learning Centres?
 - How effective is the use of Learning Agreements?
 - Are Learning Agreements being followed?
 14. What are your views on the monitoring data collected by Learning Centres about EMA recipients engagement and attendance?
 - How appropriate is attendance as a performance measure?
 - Are attendance incentives working?
 - What other measures could be used/are gathered by Learning Centres e.g. completion of coursework, contribution in work/lessons, behaviour etc
 15. What impact did COVID have upon the use of Learning Agreements and the monitoring of attendance?
 - To what extent have these practices continued post COVID?

Difference made

16. What evidence do you have about the value which is attached to the EMA amongst learners?
 - What evidence do you have that it's an essential or a nice-to-have contribution?
 - What evidence do you have that its helping to overcome increased costs of living?
 - What evidence do you have that its helping to alleviate food hardship?
17. What evidence do you have about the impact which the EMA is having upon:
 - Learners' decision to enrol on courses and stay in post 16 education?
 - Learners' attendance and engagement at school or college?
 - Learners' ability to engage in activities such as field trips and extracurricular activities?
 - Learners' grades and qualifications achieved?
 - Learners' engagement in part-time paid work?

Future

18. Should the WG continue to financially support post-16 learners directly in the future?

- If not, why not and what alternative approach, if any, would you suggest?
- If so, how should this financial support be made available?
- On what basis should learners receive financial support (e.g. household income, attendance, for specific provisions)?

19. Could the WG use its EMA funds in a more effective way?

- If so, how?
- How could the EMA (or equivalent) better target financial support towards those in greatest need?
- How could those in care, care leavers and student carers be most effectively supported?
- How could learners with ALN be most effectively supported?
- How could students from the most deprived backgrounds be supported?
- What other ways of providing financial help could be explored that would also help learners to continue with their education?

20. How might the effectiveness and impact of the EMA (or equivalent) be reviewed on an ongoing basis in the future?

- What steps/processes could be adopted?

Discussion guide 11: Interviews with non-Wales student fund administrators

These questions will be used for interviewing key stakeholders based in England, Scotland, and Northern Ireland.

Introduction

Thank you for being prepared to contribute to this review. I represent OB3 Research, who are undertaking a review of the EMA for the Welsh Government. As part of this review, we wish to draw upon the experiences of key officials involved in the administration of student finance support in England, Scotland, and Northern Ireland (NI).

The areas I'd like to discuss with you today include your views on:

- The key components of the FE student finance landscape in England/Scotland/NI
 - The administration of the EMA in Scotland/NI or the administration of the Bursary Fund in England
 - Key findings and lessons from any evaluation studied conducted recently about FE student finance schemes
 - Lessons which the Welsh Government could take on board from outside of Wales in terms of supporting Welsh FE students in the future.
1. Tell me about your role and involvement with post-16 student finance/student support within England/Scotland/NI, including the EMA/Bursary Fund (as appropriate)
 2. What are the key components of the FE student finance landscape:
 - *(as applicable)* In England / Scotland / Northern Ireland?
 - *(England only)* What student financial support do English domiciled students studying in Wales access?

Scotland and NI

3. How is the EMA administered in Scotland and NI?
 - What allowance levels are set? How are these set, and how often are they reviewed? What are decisions around income thresholds based upon?
 - What is the offer to the learner?
 - Is the allowance paid directly to the learner or via the learning centre?
 - What eligibility criteria are used? How is the eligibility criteria set and how often is it reviewed?
 - What conditions are adopted for awarding payment (e.g. learning agreements, attendance required) and how effective are these?
 - Who is responsible for the administration?
 - [If known] In what way is the EMA scheme different to that being made available in Wales?

- What accounts for any differences between the EMA scheme in Scotland/NI and Wales?
 - What have been the key developments or changes to the EMA scheme in Scotland/NI over time?
 - What prompted any changes to be made?
4. What is the profile of recipients in terms of educational setting (school/college) and type of courses being studied (academic/vocational)?
 - What accounts for this profile and why (if at all) might it differ to Wales profile of EMA recipients?
 5. How has the take up of the EMA in Scotland/NI changed over time? What factors contributed to these changes?
 6. What evidence, if any, do you have about the effectiveness of the EMA in Scotland/NI? What impact does it have upon:
 - Attendance and engagement
 - Completion of courses
 - Attainment and qualifications
 7. What are the main findings of any evaluation studies conducted to review FE student finance in Scotland/NI?

England

8. How is the Bursary Fund administered?
 - What allowance levels are set? How are these set, and how often are they reviewed? What are decisions around income thresholds based upon?
 - What is the offer to the learner?
 - What eligibility criteria are used? How is the eligibility criteria set and how often is it reviewed?
 - Who is responsible for the administration?
 - What, if any, conditions are adopted for awarding payment and how effective are these?
9. What evidence do you have about the effectiveness of the Bursary Fund in England?
 - Has it been reviewed?
 - What (if any) findings are available from any reviews of the Bursary Fund?
10. What evidence do you have about the effectiveness of the Bursary Fund compared to the previous EMA scheme?
 - In terms of encouraging more learners to stay in education
 - In terms of improving attendance and engagement in education
 - In terms of targeting students who are most in need
 - What are the advantages/disadvantages of the Bursary Fund

Annex B: EMA applicant survey tool

We are carrying out a review of the Education Maintenance Allowance Scheme (EMA) in Wales for the Welsh Government. As someone who applied for the EMA we would like your feedback. The information you share will help to provide recommendations for the future development of the scheme.

This survey is for people who have applied for EMA. You can answer the survey if your application was successful or unsuccessful.

As a thank you for your time there is an opportunity at the end of the survey to enter a prize draw to win a £50 shopping voucher.

We will use the information collected in this survey to prepare a report which will be published on the Welsh Government's Research and Statistics webpage; however, your response will be anonymous, and it will not be possible to identify you in any publication of the findings. Most questions ask for your opinion on statements, but there is a space for comments at the end.

This survey should take between five and ten minutes. Further information about the review, including a Privacy Notice is available here: www.ob3research.co.uk/privacy-notice-EMA-survey.

If you have any questions please contact nia.bryer@ob3research.co.uk

Your experience of applying for the EMA

Q2.1 **Did you complete the EMA application:**

- On paper
- Online
- Don't know / Can't remember

Q2.2 **How easy was the EMA application form to complete?**

- Very easy
- Fairly easy
- Neither easy nor difficult
- Fairly difficult
- Very difficult
- Don't know / Can't remember

Q2.2 **[If Q2.2=(4,5)] What was difficult about the application form?**

Q2.3 **How easy was it to find the necessary information, such as details about your household income, to support your EMA application?**

- Very easy
- Fairly easy
- Neither easy nor difficult
- Fairly difficult
- Very difficult
- Not relevant
- Don't know / Can't remember

Q2.4 **How important was receiving the EMA to you being able to stay in education?**

- Very important
- Fairly important
- Neither important or not important
- Not particularly important
- Not at all important
- Don't know

Q2.5 **Was your EMA application?**

- Successful
- Unsuccessful
- Don't know / Can't remember

Q2.6 **Are you currently studying at school or college?**

- Yes
- No
- Don't know

Q2.7 **[If Q2.5=2] Do you know why your EMA application was unsuccessful?**

Yes

No

Q2.8 **[If Q2.5=2] What did you think about the outcome of your EMA application?**

[If Q2.5=1 AND Q2.6=1] How you use the EMA

Q3.1 **[If Q2.5=1 AND Q2.6=1] What do you usually spend your EMA money on?**

[Please select the things which you normally use the EMA for. You can use the EMA as you want so don't worry about reporting here how you spend it. Your answers won't affect your future payments in any way.]

- Breakfast or lunch for yourself when in school or college
- Clothes
- Travelling to school or college (e.g. bus ticket, costs of running a car)
- Books or equipment for school or college
- School or college trips
- Going out with friends e.g. going out to a cinema or pub
- Holidays
- As rent to parents/guardians
- To help pay household bills
- To help pay household food costs
- I save it for the future
- Don't know
- Something else

Q3.1 **[If Q3.1=13] Please tell us how else you usually spend the EMA:**

Q3.2 **[If Q2.5=1 AND Q2.6=1] How important is the EMA to you?**

- It's essential - I could not manage without it
- It's fairly important - it helps a lot
- It's nice to have - it helps a little
- It makes no difference to me
- Don't know

Q3.3 **[If Q2.5=1 AND Q2.6=1] How important is the EMA to you and your family to cover the rising costs for essential items like food, gas and electric?**

- Very important
- Fairly important
- Neither important or not important
- Not particularly important
- Not at all important
- Don't know

Q3.4 **[If Q2.5=1 AND Q2.6=1] If you didn't get the EMA, what, if anything, would you go without, not buy, or buy less of?**

[Select all that apply]

- Breakfast or lunch for yourself when in school or college
- Clothes
- Books or equipment for school or college
- School or college trips
- Going out with friends e.g. to a cinema or pub
- Holidays
- Food at home
- Electric or gas at home
- Something else

Q3.4 **[If Q3.4=9] What else would you go without or buy less of?**

[If Q2.5=1 AND Q2.6=1] The importance of the EMA

Q4.1 **[If Q2.5=1 AND Q2.6=1] Had you not received the EMA would you have stayed on in education anyway?**

- Yes, definitely
- Yes, possibly
- Neither
- No, probably not
- No, definitely not
- Don't know

Q4.2 **[If Q2.5=1 AND Q2.6=1] Does receiving the EMA help you to attend school or college on a more regular basis?**

- Yes, definitely
- Yes, possibly
- Neither
- No, probably not
- No, definitely not
- Don't know

Q4.3 **[If Q2.5=1 AND Q2.6=1] Are you more able to engage in lessons because you receive the EMA?**

- Yes, definitely
- Yes, possibly
- Neither
- No, probably not
- No, definitely not
- Don't know

Q4.4 **[If Q2.5=1 AND Q2.6=1] Are you more able to engage in activities such as trips and extracurricular activities because you receive the EMA?**

- Yes, definitely
- Yes, possibly
- Neither
- No, probably not
- No, definitely not
- Don't know

Q4.5 **[If Q2.5=1 AND Q2.6=1] Do you have more time to study outside of school or college because you receive the EMA?**

- Yes
- No
- Don't know

[If Q2.5=2 AND Q2.6=1] The difference receiving the EMA would have made

Q5.1 **[If Q2.5=2 AND Q2.6=1] What difference would receiving the EMA make to you?**

- Big difference
- Some difference
- No difference
- Don't know

Q5.2 **[If Q2.5=2 AND Q2.6=1] What things do you go without, not buy, or buy less of because you don't receive the EMA?**

[Select all that apply]

- Breakfast or lunch for yourself when in school or college
- Clothes
- Books or equipment for school or college

- School or college trips
- Going out with friends e.g. to a cinema or pub
- Holidays
- Food at home
- Electric or gas at home
- Something else

Q5.2 **[If Q5.2=9] What else do you go without or buy less of?**

Q5.3 **[If Q2.5=2 AND Q2.6=1] If you were to receive the EMA, what would you mainly spend it on?**

[Select the main things you would spend it on]

- Breakfast or lunch for yourself when in school or college
- Clothes
- Travelling to school or college (e.g. bus ticket, costs of running a car)
- Books or equipment for school or college
- School or college trips
- Going out with friends e.g. to a cinema or pub
- Holidays
- As rent to parents/guardians
- To help pay household bills
- To help pay household food costs
- To save it for the future
- Don't know
- Something else

Q5.3 **[If Q5.3=13] Please tell us what else you would spend it on:**

Q5.4 **[If Q2.5=2 AND Q2.6=1] How much difference would receiving the EMA make to you and your family to cover the rising costs for essential items like food, gas and electric?**

- Big difference
- Some difference
- No difference
- Don't know

[If Q2.5=2 AND Q2.6=1] The importance of the EMA

Q6.1 **[If Q2.5=2 AND Q2.6=1] Would receiving the EMA help you to attend school or college on a more regular basis?**

- Yes, definitely
- Yes, possibly
- Neither
- No, probably not
- No, definitely not
- Don't know

Q6.2 **[If Q2.5=2 AND Q2.6=1] Would you be more able to engage in lessons if you were to receive the EMA?**

- Yes, definitely
- Yes, possibly
- Neither
- No, probably not
- No, definitely not
- Don't know

Q6.3 **[If Q2.5=2 AND Q2.6=1] Would you be more able to engage in activities such as trips and extracurricular activities if you were to receive the EMA?**

- Yes, definitely
- Yes, possibly
- Neither
- No, probably not

- No, definitely not
- Don't know

Q6.4 **[If Q2.5=2 AND Q2.6=1] Would you have more time to study outside school or college if you were to receive the EMA?**

- Yes
- No
- Don't know

[Q2.6=2] Why you decided not to continue in education

Q7.1 **[Q2.6=2] Why did you not continue to study at school or college?**

[Select all that apply]

- My course came to an end
- I wasn't enjoying my course
- I found the course difficult
- I found it difficult to attend my course
- I got a job
- I got an apprenticeship
- I started another training course
- I could not afford to stay on in education
- Personal health reasons
- Other reasons

Q7.1 **[If Q7.1=10] Please tell us about these other reasons:**

Q7.2 **[Q2.6=2] Were you concerned at all about how you would manage financially had you continued studying at school or college?**

- Yes, a lot
- Yes, a little

- No, not really
- No, not at all
- Don't know / can't remember

Q7.3 **[Q2.6=2] Which of the following, if any, were you concerned about paying for, had you continued studying at school or college?**

- Breakfast or lunch for yourself when in school or college
- Clothes
- Books or equipment for school or college
- School or college trips
- Going out with friends e.g. to a cinema or pub
- Holidays
- Food at home
- Electric or gas at home
- Something else
- Nothing, I had no concerns about paying for things

Q7.3 **[If Q7.3=9] What else were you concerned about paying for?**

Q7.4 **[If Q2.5=2 AND Q2.6=2] Had you received the EMA, do you think you would have stayed on in a school or college?**

- Yes, definitely
- Yes, possibly
- Neither
- No, probably not
- No, definitely not
- Don't know

Changes to the EMA

Q8.1 **The EMA weekly allowance is currently £40 per week. Do you think that this is:**

- Too much
- The right amount
- Too little
- Don't know

Q8.2 **[If Q7.1=(1,3)] What do you think the weekly EMA allowance should be?**

£ _____

Q8.3 **Do you think that attendance at school or college is the best way of awarding the EMA allowance?**

- Yes
- No
- Don't know

Q8.4 **Finally, what, if anything, would you like to see changed or improved about the EMA?**

About you

We would be very grateful if you could please tell us a little bit about yourself, so that we can understand more about the students who have completed this survey.

Q9.1 **[IF Q2.6=1] Are you a student at a:**

- College
- School
- Another setting

Q9.2 How old are you?

- 16
- 17
- 18
- 19 or older
- Prefer not to say

Q9.3 What is your sex?

- Male
- Female
- Prefer not to say

Q9.4 Is the gender you identify with the same as your sex registered at birth?

- Yes
- No

Q9.4 [If Q9.4=2] Please note your gender identity:

Q9.5 [IF Q2.6=1] Do you receive any of the following financial help or support?

[Please select all that apply]

- Free school or college meals
- Free or subsidised school or college transport
- Financial help from a college
- A grant to help with childcare
- A Welsh Government Learning Grant
- Another type of financial help

- No none of these
- Don't know

Q9.6 During the last 12 months, was there a time when, because of lack of money or other resources:

	Yes	No	Don't know
You were worried you would not have enough food to eat?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
You were unable to eat healthy and nutritious food?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
You ate only a few kinds of foods?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
You had to skip a meal?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
You ate less than you thought you should?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your household ran out of food?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
You were hungry but did not eat?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
You went without eating for a whole day?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q9.7 Do you have experience of being in care?

This means whether you have ever been cared for or looked after by a Local Authority. This could include foster care or staying at a Children's Home.

- Yes
- No
- Don't know / Don't wish to say

Q9.8 Do you care for another family member, such as a child, parent, sister or brother?

- Yes
- No
- Don't know / Don't wish to say

Q9.9 Do you have any additional learning needs, such as a learning difficulty or disability, which makes it harder for you to learn?

- Yes
- No
- Don't know / Don't wish to say

Q9.10 [If Q2.6=1] In addition to studying, do you have a paid job(s)?

- Yes
- No
- Don't know / Don't wish to say

Q9.11 [If Q9.10=1] When do you usually work in this paid job(s)?

[Please select all that apply]

- During the week (days and/or evenings)
- On the weekend
- During school or college holidays

Q9.12 [If Q9.10=1] How many hours do you usually work in this paid job during term time when in school or college?

Thank you for completing this questionnaire. Please ensure that you submit the survey.