

To: EDUCATION (RESOURCES) SUB-COMMITTEE	Subject : HIGHER SCHOOL BURSARIES 2004-2005: PERFORMANCE REVIEW
From: DIRECTOR OF EDUCATION	
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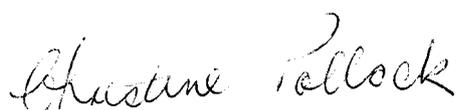
Purpose of Report

This report reviews the performance of the higher school bursaries budget for year 2004 - 2005. It also includes details of the bursary applications received and pupil attendance.

Recommendations

The education (resources) sub-committee is recommended to:

- (a) note the performance of the higher school bursaries budget for the period April 2004 to March 2005.
- (b) to request the submission of further performance reports to future meetings of the sub-committee.



Members wishing further information about this report should contact

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Higher School Bursaries – Performance Review, 2004-2005

Report by the Director of Education

1. Background.

- 1.1 In session 2004-2005 the first phase of the national rollout of Education Maintenance Allowance (EMA) commenced and will be fully implemented in session 2007-2008. As a result, Higher School bursaries are being phased out and in session 2004-2005 only students who became 16 before 1 March 2004 and who were in S6 were eligible to apply for bursary support.

2. Applications

- 2.1 A total of 393 applications were received for academic session 2004-2005. Of the applications received, 14 were refused because the students were not eligible for support for the following reasons:

- (1) not resident in North Lanarkshire (4 pupils)
- (2) already funded for 2 years (3 pupils)
- (3) too young for bursary or EMA support (2 pupils)
- (4) attending school outwith North Lanarkshire (1 pupil)
- (5) undertaking repeat year (3 pupils)
- (6) missed both deadlines for submission (1 pupil)

- 2.2 19 applications were withdrawn, either because the students left school, or indicated that they no longer wished to be considered.

2.3 Late Applications and Eligibility on Grounds of Residency.

A further 7 students were not eligible for support until January 2005. In six cases the applications were received more than 2 months after the start date of the course and in one case the application was not resident in North Lanarkshire on the “qualifying date” of 30 June in order to be eligible for a full-year award. An additional 2 students who had submitted their applications more than 2 months after the start date of the course successfully appealed against the refusal of the award for the full year and had their payments backdated to the start of session. These students are included in the 360 eligible students referred to at 2.4 below.

- 2.4 Of the 360 eligible applications, 350 letters of award have been processed. These have resulted in no awards to 74 students due to the level of parental income (“financial refusal”), 7 awards made provisionally to students whose parents are self-employed or whose parents’ income has reduced by more than 15% compared to that of the last financial year. Awards have been made to 269 students. The remaining 10 applications were not processed as the students did not provide all of the necessary documentation.

Table 1 – Awards Processed

Financial Refusals	Not processed due to lack of documentation	Provisional Awards	Standard Awards
74	10	7	269

- 2.5 Of the 276 standard and provisional awards, 233 students were awarded the maximum full-year bursary of £864 and 2 students were awarded the maximum 2-term bursary of £480. The remaining 41 students were awarded reduced amounts because the gross household income in the last financial year was over the £10,453 threshold.

3. Budget Analysis

- 3.1 Table 2 is a detailed analysis of expenditure for Higher School bursary for the full financial year, April 2004 to March 2005.

Table 2 – Payments, April 2004 to March 2005

Higher School Bursaries Budget	Expenditure, April 2004 to March 2005	Estimated Expenditure, 2004/2005
£213,000	£248,366	(£35,366)

- 3.2 The overspend can be attributed to two things. Firstly, the budget was reduced from £513,000 in financial year 2003-2004 to £213,000 in 2004-2005 as a result of the introduction of EMA. Pupil attendance has improved compared to the previous session therefore more was paid out than had been anticipated.

4. Attendance

- 4.1 Attendance was monitored in 3 periods, 18 August to 29 October 2004, 1 November 2004 to 21 January 2005 and 24 January to 24 March 2005. Awards were reduced in the case of students with an attendance of less than 95% unless (1) a self-certification form was submitted and substantiated by the school, (2) a medical certificate was submitted or (3) the Education (Joint Appeals, Maintenance Allowance and Bursaries) sub-committee has upheld an appeal.
- 4.2 Table 3 shows a comparison of attendance in the 3 reporting periods this session and the equivalent periods in 2002-2003 and 2003-2004.

Table 3 – Attendance Comparison

Academic session	Monitoring period	No of applicants	Attendance under 95%	
			No	%
2002/2003	Aug to Nov 02	629	174	28%
	Nov 02 to Jan 03	586	180	31%
	Jan to Apr 03	720	234	33%
2003/2004	Aug to Oct 03	555	146	26%
	Nov 03 to Jan 04	507	153	30%
	Jan to Mar 04	621	183	29%
2004/2005	Aug to Oct 04	283	52	18%
	Nov 04 to Jan 05	265	89	34%
	Jan to Mar 05	258	71	28%

4.3 Two points are worth noting. Firstly, the number of applicants for Session 2004-2005 is significantly lower due to the introduction of Education Maintenance Allowance. Secondly, attendance in the first period in session 2004-2005 was significantly better but the improvement was not maintained in second and third periods.

5. Recommendations

The education (resources) sub-committee is recommended:

- (a) to note the performance of the higher school bursaries budget for the year 2004 to 2005.
- (b) to request the submission of further performance reports to future meetings of the sub-committee.