

**EDUCATION (FORMER RESIDENTS OF CERTAIN INSTITUTIONS FOR
CHILDREN) FINANCE BOARD**

ANNUAL REPORT 2010

1. Introduction

Section 32 (1) of the Commission to Inquire into Child Abuse (Amendment) Act 2005 provides that the Education (Former Residents of Certain Institutions for Children) Finance Board, hereinafter referred to as the Board, shall not later than 31 March in each year prepare and publish in such form and manner as it considers appropriate, a report of its activities and proceedings during the preceding year.

2. Establishment of Board

The Minister for Education and Science, as provided for in Section 23 of the Commission to Inquire into Child Abuse (Amendment) Act 2005, signed an order establishing the Education (Former Residents of Certain Institutions for Children) Finance Board on a statutory basis with effect from 17 February 2006.

The composition of the Board comprises a Chairperson and eight ordinary members all of whom are appointed by the Minister for Education and Science. The members are drawn from a wide range of backgrounds with a particular provision that four of the members shall be persons who are each former residents of one or more of the Institutions.

The Board held twelve meetings during 2010. The Board also established a Finance/Audit Committee in November 2009 and that Committee met on nine occasions in 2010. In addition sub groups of Board members met between Board meetings on a further twenty four occasions to deal with the approval of grant applications so that the payment of such grants could be facilitated.

The following were members of the Board during the period covered by this report:

| <i>Name</i> | <i>Attendance at Board Meetings</i> |
|--|-------------------------------------|
| Richard Langford, Chairperson | 12/12 |
| <ul style="list-style-type: none"> • Michael O Brien(Deputy Chairperson until 07.09.2010) | 11/12 |
| <ul style="list-style-type: none"> • John Brennan (Deputy Chairperson from 07.09.2010) | 11/12 |
| <ul style="list-style-type: none"> • Bernadette Fahy | 12/12 |
| <ul style="list-style-type: none"> • Chris Heaphy | 11/12 |
| <ul style="list-style-type: none"> • Brian Mooney | 12/12 |
| <ul style="list-style-type: none"> • Peter Ormond | 10/12 |
| <ul style="list-style-type: none"> • Jacinta Stewart | 10/12 |
| <ul style="list-style-type: none"> • Patrick Walsh | 10/12 |

Reports of all meetings of the Board from the date of establishment have been made available on the Board's website www.educationfinanceboard.com so that key stakeholders and other interested parties can be regularly updated on the Board's activities.

3. Functions of Board

The principal functions of the Board laid down in the 2005 Act are

- To pay grants to former residents in institutions and their relatives (spouse, son, daughter, grandson, granddaughter, stepson, stepdaughter) to assist them to avail of such educational services as the Board may determine.
- To determine and publish the criteria by reference to which it will make decisions on applications to the Board for the payment of such grants.
- To make available to former residents and their relatives information in relation to the educational services in respect of which such grants are payable.

4. Criteria for Payment of Grants

Prior to the establishment of the Board grants were paid to eligible applicants under an administrative scheme operated under the aegis of the Minister for Education and Science. The criteria by reference to which decisions were made on applications for the payment of such grants were determined by an ad hoc committee set up to operate the administrative scheme. The total draw down from the fund under the administrative scheme amounted to €2,484,992.

As it did not wish to disrupt the momentum generated under the administrative scheme the Board on its establishment decided, pending the determination of revised criteria, to continue on an interim basis with the criteria used by its predecessor ad hoc committee subject to one minor amendment which it made to have regard to a detail of the legislation.

Detailed consideration was then given to reviewing the previous and interim criteria with a view to determining revised criteria which would build on experience to date of the ad hoc committee and of the Board itself. Arising from this review the Board determined revised criteria which it has published for implementation in the case of grant applications received on or after 17 November 2006. Arrangements are in place for the criteria to be subject to review from time to time and the criteria were again reviewed during 2010 to reflect emerging patterns in grant applications and expenditure. The criteria in operation at 31 December 2010 are detailed in the attached Appendix A.

5. Finance

The funds available to meet the expenditure of the Board in the performance of its functions are identified in Section 26 of the 2005 Act. These funds arise from the contribution of €12700000 from the Religious Congregations under the terms of the Deed of 05 June 2002 augmented by interest earned on unspent amounts from which must be subtracted any amounts paid by the Minister for Education and Science before the passing of the 2005 Act as grants to former residents in Institutions and to the relatives of such persons to assist those former residents or their relatives to avail of education services.

Section 26 (2) provides that the National Treasury Management Agency shall establish an investment account into which the amount paid to it under Section 26(1) shall be deposited. The history of that account to 31 December 2010 is detailed in the attached Appendix B and shows a balance of €3,631,183 at that date.

Having taken account of expenditure to 31 December 2010 the total funds available to the Board at that date was €3,649,345 made up as follows:

| | |
|--|-------------------------|
| Investment Account Balance | 3,631,186 |
| Funds held by City of Dublin VEC at 31 December 2010 | 51,107 |
| Prepayments | 2,124 |
| Unspent Balance from ad hoc scheme drawdown (t/f to Invest acc 30/12/10) | <u>0</u> |
| | 3,684,417 |
| Less accrued liabilities at 31 December, 2010 | 35,072 |
| | <u>3,649,345</u> |

The Board has set annual and overall limits in its current criteria on the amounts it may pay to former residents and/or their relatives. Grants approved by the Board are in respect of tuition fees and educational assistance for a current academic year provided they are within these limits. Where a person has commenced on a course of study which

may continue over a number of years, it has been the Board's policy to estimate the costs to completion of the course and to reserve the amount of these future costs or the balance of the persons overall grant limit whichever is the lower. If all such commitments at 31 December, 2010 were to be realized, the remaining funds available to the Board for new applications would be reduced by an additional amount in the order of €1,358,126.

6. Accounts and Audits

Section 31 of the 2005 Act provides for the submission of accounts kept in pursuance of this section to the Comptroller and Auditor General for audit not later than 3 months after the end of the accounting period to which they relate.

The accounts for the periods from the establishment of the Board on 17 February 2006 to 31 December 2006 and for the 2007, 2008 and 2009 years have been audited by the Comptroller and Auditor General and these have been presented by the Board to the Minister. These accounts have been published by the Board and are available on the Board's website.

The accounts for the year ending 31 December 2010 have been prepared and submitted to the Comptroller and Auditor General for audit. Immediately after the audit, a copy of such accounts as the Minister directs, together with the report of the Comptroller and Auditor General shall be presented by the Board to the Minister following which they will be published and made available on the Board's website.

The Comptroller and Auditor General also issues special reports from time to time in which he examines a range of issues arising out of financial audits. Report No. 74 which was published during 2010 dealt with a number of such issues relating to bodies and activities subject to funding from the Minister for Education and Skills. . This report reviewed, *inter alia*, the current estimate of the cost of redress to victims of abuse in residential institutions and the extent to which the State indemnity has been invoked. That section of the report contains references to the Education Finance Board and the relevant extract is attached at Appendix D.

7. Grant Approvals

During 2010 the Board approved 1901 grants. The corresponding figures for 2006, 2007, 2008 and 2009 were 892, 1200, 1526 and 1914 respectively. The overall value of the grant payments during 2010 amounted to €1,513,884.

The distribution of the 1901 approved grants is as follows:

| | 2010 | | 2009 | | 2008 | | 2007 | | 2006 | |
|------------------|-------------|--------------|--------------|--------------|-------------|--------------|-------------|--------------|-------------|--------------|
| Former Residents | <u>447</u> | <u>23.5%</u> | <u>440</u> | <u>23.0%</u> | <u>371</u> | <u>24.3%</u> | <u>311</u> | <u>25.9%</u> | <u>236</u> | <u>26.5%</u> |
| Children | <u>891</u> | <u>46.9%</u> | <u>1,046</u> | <u>54.7%</u> | <u>880</u> | <u>57.7%</u> | <u>761</u> | <u>63.4%</u> | <u>598</u> | <u>67%</u> |
| Spouses | <u>73</u> | <u>3.8%</u> | <u>74</u> | <u>3.9%</u> | <u>61</u> | <u>4.0%</u> | <u>48</u> | <u>4.0%</u> | <u>56</u> | <u>6.3%</u> |
| Grandchild | <u>481</u> | <u>25.3%</u> | <u>342</u> | <u>17.9%</u> | <u>203</u> | <u>13.3%</u> | <u>76</u> | <u>6.3%</u> | <u>01</u> | <u>0.01%</u> |
| Stepchild | <u>09</u> | <u>0.5%</u> | <u>12</u> | <u>0.6%</u> | <u>11</u> | <u>0.7%</u> | <u>04</u> | <u>0.3%</u> | <u>00</u> | <u>0.0%</u> |
| Group | <u>00</u> | <u>0.0%</u> | <u>00</u> | <u>0.0%</u> | <u>00</u> | <u>0.0%</u> | <u>00</u> | <u>0.0%</u> | <u>01</u> | <u>0.0%</u> |

The current locations of the former residents and relatives in receipt of the 1901 grants are as follows:

| | 2010 | | 2009 | | 2008 | | 2007 | | 2006 | |
|---------|-------------|--------------|-------------|--------------|-------------|--------------|-------------|--------------|-------------|--------------|
| Ireland | <u>1542</u> | <u>81.1%</u> | <u>1525</u> | <u>79.7%</u> | <u>1168</u> | <u>76.5%</u> | <u>804</u> | <u>67.0%</u> | <u>646</u> | <u>72.4%</u> |
| UK | <u>301</u> | <u>15.8%</u> | <u>323</u> | <u>16.8%</u> | <u>304</u> | <u>19.9%</u> | <u>349</u> | <u>29.1%</u> | <u>202</u> | <u>22.7%</u> |
| Other | <u>58</u> | <u>3.1%</u> | <u>67</u> | <u>3.5%</u> | <u>54</u> | <u>3.6%</u> | <u>47</u> | <u>3.9%</u> | <u>44</u> | <u>4.9%</u> |

2010 Other (USA 23: New Zealand 8: Canada 8: Australia 4: Sweden 4: Spain 3: France 2: Malta 2: Netherlands 2: Germany 1: Austria 1)

2009 Other (USA 30: Australia 11: New Zealand 6: Canada 5: Sweden 4: France 2: Germany 2: Jersey 2: Austria 1: Malta 1: Spain 1)

2008 Other (USA 19: Australia 17: Sweden 8: Spain 4: Germany 2: Jersey 1: Austria 1: Netherlands 1: France 1)

2007 Other (USA 20: Australia 16: Sweden 6: Germany 3: Spain 1: Canada 1)

2006 Other (USA 21: Australia 14: Sweden 3: France 3: Spain 1; Canada 1; Portugal 1)

Grants were not awarded in the case of 99 applications which did not satisfy the criteria determined by the Board. 20 (20.2%) of these were from former residents and 79 (79.8%) were from relatives.

The number of grants approved during 2010 is similar to the 2009 outcome. The increase in the number of approvals following on the publication of the Ryan Report during 2009 was even greater in 2010. This is due in no small way to the efforts of the different support groups for former residents and of the outreach services. The Board appreciates and values this assistance which it hopes will continue in the future. While this is welcome, the Board has noted that the continuing surge in applications allied to a reduction in the order of 10% in available staffing during 2010 has given rise to regrettable delays in dealing with applications and is undertaking a further review of its procedures and related communications arrangements to deal with this issue. This further review will be the subject of consultation with the support groups.

8. Utilisation of the Fund

The Board has carried out an extensive examination of the grant payments for the academic/school year ending 31 August 2010 and the details of that analysis are given in the attached Appendix C.

A summary of that analysis shows that 21.6% of the applicants in receipt of grants in that year were former residents and 78.4% were relatives (51.6% children/stepchildren; 22.6% grandchildren; 4.2% spouses) and that 24.4% of the funding was received by former residents with 75.6% being received by relatives (52.6% children/stepchildren; 19.8% grandchildren; 3.2% spouses).

16% of those in receipt of grants to pursue higher education programmes (i.e. at a level equivalent to or higher than Level 7 in the National Framework of Qualifications) were former residents and 84% were relatives. 20% of the funding allocated to higher education programmes was received by former residents with the remaining 80% being received by relatives. The average grant for higher education purposes was €2,981 for former residents and €2,237 for relatives reflecting the higher limits provided in the Board's criteria in the case of former residents.

53% of the applicants in that year were under 26 years of age (32% children/stepchildren; 21% grandchildren) 36% were aged between 26 and 54 (12% former residents; 19% children/stepchildren; 2% grandchildren; 3% spouses) and the remaining 11% were over 55 years (9% former residents; 1% children; 1% spouses).

In addition to the above the Board has decided to carry out an examination of some other aspects of the utilization of the Fund. The first such study analysed the transfer rates of applicants who were in receipt of funding in 2006/2007 to assist their participation in courses classified at Level 8 in the National Framework of Qualifications. These would lead to honours degrees after three or four years or to post-graduate diplomas. Of the 153 applicants eligible for funding to continue their courses in 2007/2008, 129 did receive further funding to assist them in continuing their studies while twenty four did not seek any further funding. This represents a very satisfactory retention rate of 84%. 14 of the 153 referred to above were former residents and all but two of them continued their studies with the help of further funding giving an even higher retention rate of 86%.

9. Staffing

The initial core staffing consisted of a Secretary/ Manager and an administrative assistant with other staffing being appointed as required on a temporary basis to deal with the processing of applications as they arise.

As the only funds available to the Board towards expenditure in the performance of its functions are those in the investment account established under the provisions of Section 26 (3) of the 2005 Act, the Board has been particularly concerned to utilise those funds to the maximum extent possible in paying grants to former residents and their relatives and the Board has sought to minimize the essential expenditure for administrative and governance purposes. This has entailed the appointment of some additional staff to sustain an appropriate level of service to its growing client base. The ongoing staffing requirements will be the subject of detailed consideration in the review referred to at Section 7 above.

The City of Dublin VEC continues to provide a payments service and the Board is grateful to the Chairperson, members and CEO of the VEC for this assistance. The Board also greatly appreciates the assistance received during its establishment and as requested thereafter from the staffs of the Residential Institutions Redress and Legal Services Units of the Department of Education and Science.

10. Contact Details

The Board's offices are located at

3rd Floor Frederick Court, 24/27 North Frederick Street, Dublin 1.

The contact arrangements are:

| | | |
|------------|--|-------------------------------|
| Telephones | 00353 (1)8745708 | Lo Call (Ireland) 1890 742742 |
| Fax | 00353 (1)8745709 | |
| e-mail | info@educationfinanceboard.com | |
| Website | www.educationfinanceboard.com | |

While the Lo Call facility is available only to callers within Ireland, staff will call back clients telephoning from outside Ireland.

Appendix A

Education (Former Residents of Certain Institutions for Children) Finance Board

Criteria for Awarding Grants

2010

Criteria for Awarding Grants by the Education Finance Board

September 2010

Contents

- Introduction

- Criteria under which applications for funding are approved by the Board
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 - *Proof of residency*
 - *Approved courses and programmes*
 - *Grants*
 - *Points to note*
 - *Schedule of grants*
 - *Maximum grant limits*
 - *Special cases*
 - *Reviewing decisions*
 - *Effective date*

Introduction

The Board intends that the grants to be paid from funds available under Section 26 of the 2005 Act will help applicants use the educational services decided by the Board.

Payment of all grants is subject to the availability of funds to the Board.

The Board will have particular regard to the needs of former residents as well as those of any of their relatives with identifiable gaps in their education which arose as a result of residence in one of the specified institutions.

This booklet sets out the Board's criteria for awarding grants. The criteria may be revised from time to time and will be reviewed by the Board not later than September 2011.

The Board's full-time staff will handle applications for grants from former residents and their relatives. The Board welcomes all queries and applications. Should you have any queries or should you wish to make a grant application, please use the contact information in this booklet to speak to a member of staff.

Who may apply for grants?

The grants are open to all former residents of the institutions listed in the Residential Institutions Redress Act, 2002 (see www.educationfinanceboard.com) whose residency commenced prior to 11th May 1999 and to their relatives, i.e. their spouse, sons, daughters, grandsons, granddaughters, stepsons and stepdaughters.

Proof of residency

The relevant laws do not define the term ‘resident’, but it normally means living and sleeping in a place for some time. In general, the Board will consider whether the institution in question may be regarded as the applicant’s home at the time.

Anyone who applies must supply satisfactory written and other appropriate evidence of identity and confirmation of residence in an institution. Relatives must also provide written evidence of their relationship to a former resident. The application form outlines the evidence required.

Courses and Criteria under which applications for funding are approved by the Board

1. Approved courses and programmes

The Board offers funding to eligible people for a range of approved courses.

- (a) Adult Education, Life Skills, Post Leaving Certificate, Undergraduate and Post-graduate courses
 - (b) Personal Development and Lifestyle courses, Driving Lessons, Literacy courses and One-to-One tuition.
 - (c) Primary, Post-primary school support programmes
-
- (a) Adult Education, Life Skills, Post Leaving Certificate (PLC), Undergraduate and Post-graduate courses

Approved courses should:

- last at least one academic year, except in the case of Life Skills, and
- ideally, be provided by a publicly-funded institution.
- **the Board will only support a single course at a particular level in this category, unless there are exceptional circumstances. For example, if**

you receive a grant towards the fees or related charges of a primary degree, you cannot later apply for funding for a second primary degree.

If a suitable course is not available in a publicly-funded institution, the Board may consider applications for suitable courses offered by private bodies.

Approved courses must lead to qualifications that are recognised by a state-approved framework, whether in Ireland or another country.

In Ireland, the qualification must be placed at level 3 or higher in the National Framework of Qualifications.

An arrangement exists to align qualifications in Ireland and the UK. This will inform decisions on appropriate recognition for qualifications from UK courses.

The Board may consider courses not covered by this arrangement individually, to decide if the qualification to be awarded is appropriate.

(b) Approval for other courses may include the following:

Personal development and lifestyle courses

Courses must be provided by a recognised provider or an accredited trainer of the nationally-recognised body.

Driving Lessons (up to 10 hours) To apply for funding for up to 10 hours driving lessons, all applicants must include a copy of a valid provisional driving licence

A former resident who completes the initial 10 hours may be approved for up to another 10 hours if they provide a letter of recommendation from their driving instructor saying how many hours tuition they would need to pass the driving test.

Literacy, Numeracy and One-to-One Tuition The Board will consider these courses according to each applicant's needs and will need regular reports from the tutor to decide if further one-to-one tuition is needed.

(c) Primary, post-primary school support programmes

Extra tuition (normally one hour a week for each child) This covers extra tuition for school going students by qualified teachers if the school endorses it. The applicant must provide appropriate documents, i.e. a copy of the relevant teacher's qualifications; the teacher's PPS Number (RSI or National Insurance number in the UK) and the cost for each session.

After-school activities These might include activities such as music lessons, swimming and so on.

Short Courses

These must be formal education programmes. Examples include Gaeltacht trips or other summer language courses.

Transition Year

The Board may also consider Transition Year participation costs under this heading.

2. Special cases

If the Board believes that special circumstances apply, especially to a former resident, the Board has discretion to change the Criteria.

3. Reviewing decisions

Applicants who are not satisfied with a decision relating to their application, may ask the Board to review it. If the applicant is dissatisfied with the outcome of the Board's review, they may refer the matter to the Ombudsman.

4. Effective date

These rules take effect from the 1st September 2010.

These Criteria are subject to review and may be changed without notice.

Summary of Grants issued by the Board

5. Grants

Grants to former residents and / or their relatives may be paid under two headings as outlined below:

Grants towards Tuition Fees and Related Charges

These are a contribution towards the cost of tuition fees and / or related student service charges such as registration, examination or professional association fees.

Grants towards Education Assistance

These help applicants in meeting additional costs with their participation in approved post-school, undergraduate and post-graduate courses.

6. Limits on Grants

There is a Total Grant Limit and an Annual Grant Limit on the amount payable to any former resident and/or their relative. These are as follows:

Total Grant Limit

- A total of €15,000 to a former resident. This limit applies only to former residents and is not transferable to relatives.
- A maximum of €5,000 to an individual relative. A total of €15,000 to all relatives of a former resident. These limits are fixed and cannot be transferred.

Annual Grant Limit

These limits are detailed in Section 8.

7. Points to note:

- Payment of all grants is subject to the availability of funds to the Board.
- The Board can only pay grants to applicants that meet all the criteria of the grant scheme.
- The Board will only pay grants for the current year of study, i.e. 1st September 2009 to 30th August 2010. Applications relating to courses or course modules that have been completed in a previous academic year will not be eligible for grants or assistance.
- Grants provided by the Board are only for courses and do not cover membership of gyms or professional organisation fees once the course is completed.

8. Schedule of grants towards tuition fees, related charges and educational assistance

The maximum amounts a former resident and/or their relatives may get for suitable courses under this scheme are outlined below. These amounts are subject to the overall limits detailed in Section 6 above. The maximum amounts in this schedule, relate to the 'nett charge' for a course. This

charge is the amount an applicant must personally pay for the course after receiving other grants. It is not the full cost of the course.

Annual Grant Limits on Tuition Fees and Related Charges

| Grants | Former Residents | Relatives |
|---|--|---|
| Fees for approved post-school, life skills and undergraduate courses | A maximum of €6,000 a year towards the nett charge | <ul style="list-style-type: none"> • A maximum of €1500 a year where the nett charge is €3,000 or less each year. • Half the nett charge, up to a maximum of €2,000 a year, where the nett charge is more than €3,000 a year. |
| Fees for approved post-graduate courses | A maximum of €6,000 towards the nett charge for the normal length of the course | <ul style="list-style-type: none"> • A maximum of €1,500 a year where the nett charge is €3,000 or less each year • Half the nett charge, up to a maximum of €2,500 in each year, where the nett charge is more than €3,000 for each year of the course • Overall maximum €5000 for the length of the course |
| Educational assistance | <p>Full-time study: two payments of €800 a year (total €1,600)</p> <p>Part-time study: two payments of €300 a year (total €600)</p> <p>The Board will consider each application related to distance education individually</p> <p>Applicants must provide written evidence that they are still taking part in the course to receive their second payment of the year</p> | |

Annual Grant Limits on Personal Development and Lifestyle courses, Driving Lessons, Literacy and One-to-One tuition for former residents and/or their relatives

| | |
|--|--|
| Personal development and lifestyle courses | <ul style="list-style-type: none"> • A maximum of €1,000 for each applicant each year • Assistance up to €200 towards additional certified expenditure in respect of course materials and other • course-related costs may be available. |
| Driving lessons | <ul style="list-style-type: none"> • Car – a maximum of €40 per lesson plus theory and practical test fee • Truck or minibus – a maximum of €750 plus test fee • Coach – a maximum of €1000 plus test fee • Driving instructor – a maximum of €1,500 in Ireland and an appropriate contribution for a similar course overseas. |
| Extra tuition, after-school programmes and summer courses | <ul style="list-style-type: none"> • The Board has set aside a budget of €75,000 for 2010/2011. • Extra tuition and after-school programmes – a maximum of €30 an hour and €900 a year • Course costs – a maximum of €900 a year. |

Background

The Education (Former Residents of Certain Institutions for Children) Finance Board

Under the terms of the Indemnity Agreement between the Irish State and 18 religious congregations, dated the 5th June 2002, a fund of €12.7 million is to be used for former residents and their relatives to facilitate them in accessing education programmes.

On 17th February 2006, Minister for Education and Science, Mary Hanafin TD, established a statutory body, the Education Finance Board/An Bord Airgeadais Oideachais, under the Commission to Inquire into Child Abuse (Amendment) Act 2005, to administer the fund. The Education Finance Board has replaced the Ad Hoc Committee that managed the fund until the legislation was in place.

The functions of the Board are as follows:

- to determine and publish the criteria for the payment of such grants
- to pay grants to former residents of institutions and their relatives to assist them in the availing of educational services
- to provide information in relation to educational services for which grants are payable

Contact information

Education Finance Board
Floor 3 Frederick Court 24/27
North Frederick

Street
Dublin 1

Within Ireland **Telephone:** 1890 742 742 **Fax:** 01 8745709

Outside Ireland **Telephone:** 00353 1 8745708 **Fax:** 00353 1 8745709

Email info@educationfinanceboard.com

Web www.educationfinanceboard.com

Appendix B

National Treasury Management Agency Investment Account

National Treasury Management Agency Investment Account

Section 26 of the Commission to Enquire into Child Abuse (Amendment) Act 2005 provides for the payment of a specified amount into an investment account managed by the National Treasury Management Agency (NTMA). Amounts were transferred by the Minister for Finance prior to the establishment of the board. The balance available at 31 December 2008 arose as follows.

| | € |
|--|-------------------|
| Contribution of Religious Congregations under the terms of the Deed of 5 June 2002 | 12,700,000 |
| Accrued interest (second relevant amount) | 240,000 |
| Amount arisen by accretion (third relevant amount) | 510,000 |
| | 13,450,000 |
| Expenditure incurred under an ad hoc scheme which operated from 2003 prior to the establishment of the Board on 17 February 2006 | (2,484,992) |
| Transfer to NTMA to establish investment account | 10,965,008 |
| Interest on amounts transferred up to establishment date | 126,055 |
| Fund opening balance at 17 February 2006 | 11,091,063 |
| Total expenditure for the year 2006 | (1,450,614) |
| Interest on amounts up to 31 December 2006 | 266,320 |

| | |
|--|------------------|
| Fund opening balance at 1 January 2007 | 9,906,769 |
| Total expenditure for the year 2007 | (1,384,082) |
| Interest on amounts up to 31 December 2007 | 360,942 |
| Fund opening balance at 1 January 2008 | 8,883,629 |
| Total expenditure for the year 2008 | (1,840,820) |
| Interest on amounts up to 31 December 2008 | 310,106 |
| Fund opening balance at 1 January 2009 | 7,352,915 |
| Total expenditure for the year 2009 | (2,049,271) |
| Interest on amounts up to 31 December 2009 | 45,146 |
| Fund opening balance at 1 January 2010 | 5,348,790 |
| Total expenditure for the year 2010 | (1,717,054) |
| Interest on amounts up to 31 December 2010 | 17,609 |
| Fund opening balance at 1 January 2011 | 3,649,345 |

Appendix C

Academic year 2009 – 2010

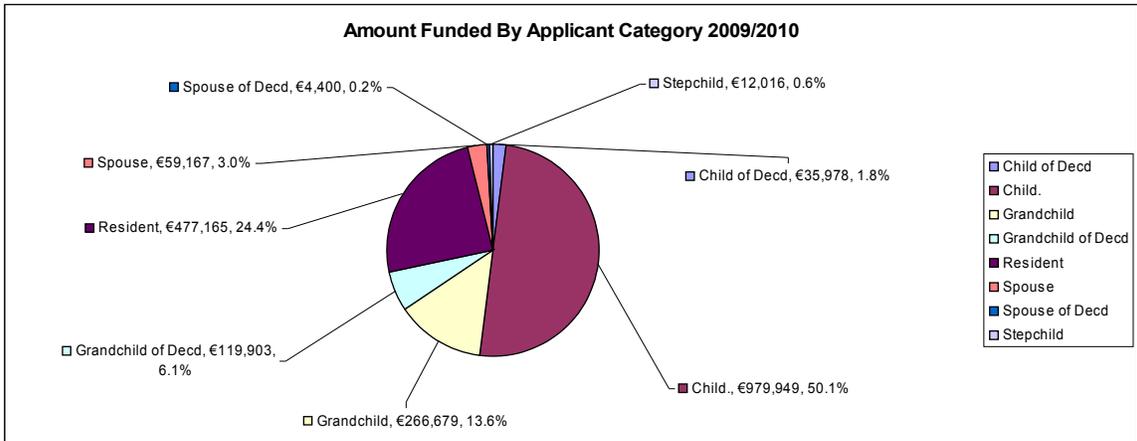
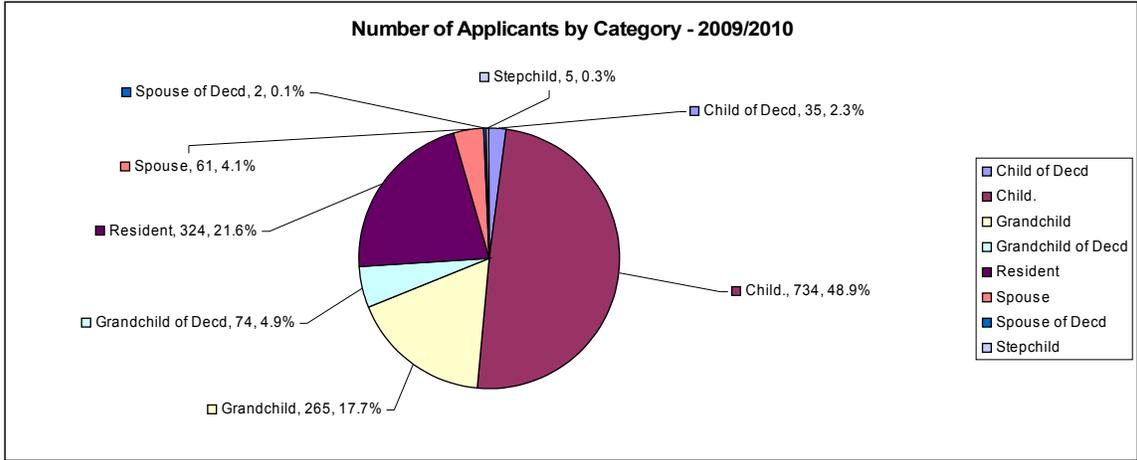
Statistical analysis

**Amount Funded for Academic Year
2009/2010**

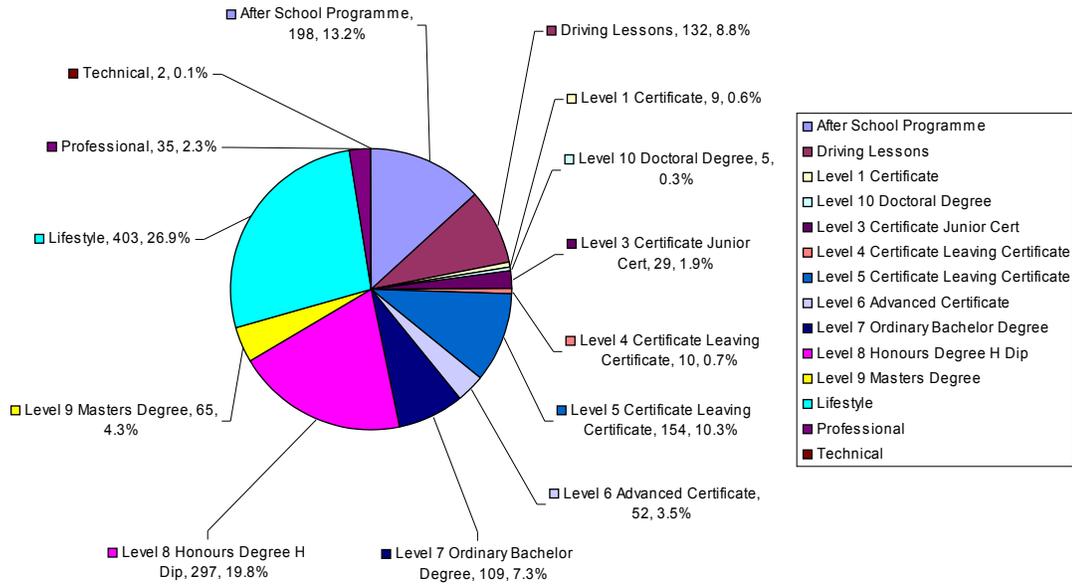
| Course | Child of Decd | Child. | Grandchild | Grandchild of Decd | Resident | Spouse | Spouse of Decd | Stepchild | Grand Total |
|---|----------------|-----------------|-----------------|--------------------|-----------------|----------------|----------------|----------------|-------------------|
| After School Programme | | €67,879 | €40,632 | €6,266 | | | | | €114,777 |
| Driving Lessons | €3,427 | €25,495 | €4,375 | €2,784 | €18,189 | €2,552 | | | €56,823 |
| Level 1 Certificate | | €180 | | | €14,039 | | | | €14,219 |
| Level 10 Doctoral Degree | €1,905 | €3,327 | | | €3,200 | | | | €8,432 |
| Level 3 Certificate Junior Cert | | €6,933 | €1,767 | | €14,004 | €1,485 | | | €24,188 |
| Level 4 Certificate Leaving Certificate | | €3,300 | | | €8,074 | | | | €11,374 |
| Level 5 Certificate Leaving Certificate | €3,498 | €115,262 | €23,836 | €10,265 | €62,955 | €4,545 | | €1,916 | €222,276 |
| Level 6 Advanced Certificate | €3,900 | €52,702 | €3,311 | €330 | €22,825 | €4,038 | | | €87,105 |
| Level 7 Ordinary Bachelor Degree | €8,200 | €95,291 | €21,761 | €19,529 | €71,432 | €9,600 | €4,400 | | €230,213 |
| Level 8 Honours Degree H Dip | €3,412 | €387,099 | €126,590 | €64,770 | €118,151 | €9,595 | | €4,100 | €713,717 |
| Level 9 Masters Degree | €3,200 | €105,225 | €7,956 | €7,900 | €36,745 | €3,620 | | €5,000 | €169,646 |
| Lifestyle | €6,511 | €83,386 | €35,602 | €8,059 | €84,384 | €17,031 | | €1,000 | €235,972 |
| Professional | | €33,870 | €850 | | €23,168 | €6,701 | | | €64,589 |
| Technical | €1,925 | | | | | | | | €1,925 |
| Grand Total | €35,978 | €979,949 | €266,679 | €119,903 | €477,165 | €59,167 | €4,400 | €12,016 | €1,955,257 |

**Number of Applicants Funded for Academic Year
2009/2010**

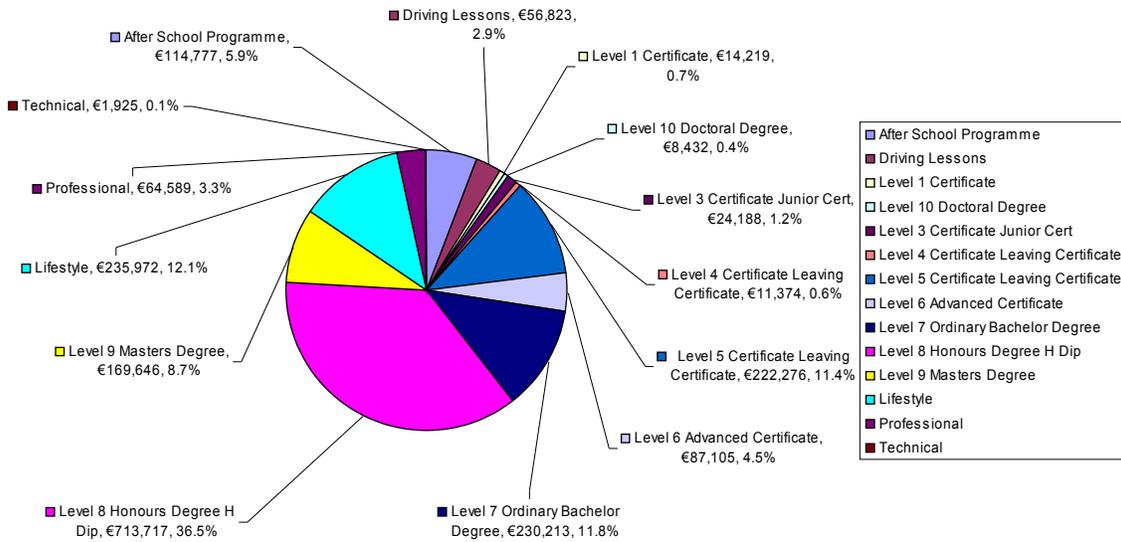
| Course | Child of Decd | Child. | Grandchild | Grandchild of Decd | Resident | Spouse | Spouse of Decd | Stepchild | Grand Total |
|---|---------------|------------|------------|--------------------|------------|-----------|----------------|-----------|-------------|
| After School Programme | | 111 | 78 | 9 | | | | | 198 |
| Driving Lessons | 5 | 65 | 15 | 10 | 30 | 7 | | | 132 |
| Level 1 Certificate | | 1 | | | 8 | | | | 9 |
| Level 10 Doctoral Degree | 1 | 2 | | | 2 | | | | 5 |
| Level 3 Certificate Junior Cert | | 9 | 1 | | 16 | 3 | | | 29 |
| Level 4 Certificate Leaving Certificate | | 4 | | | 6 | | | | 10 |
| Level 5 Certificate Leaving Certificate | 4 | 76 | 23 | 9 | 39 | 2 | | 1 | 154 |
| Level 6 Advanced Certificate | 3 | 29 | 2 | 1 | 14 | 3 | | | 52 |
| Level 7 Ordinary Bachelor Degree | 4 | 51 | 11 | 9 | 26 | 6 | 2 | | 109 |
| Level 8 Honours Degree H Dip | 2 | 171 | 58 | 21 | 39 | 4 | | 2 | 297 |
| Level 9 Masters Degree | 2 | 43 | 4 | 3 | 10 | 2 | | 1 | 65 |
| Lifestyle | 12 | 153 | 72 | 12 | 123 | 30 | | 1 | 403 |
| Professional | | 19 | 1 | | 11 | 4 | | | 35 |
| Technical | 2 | | | | | | | | 2 |
| Grand Total | 35 | 734 | 265 | 74 | 324 | 61 | 2 | 5 | 1500 |



Number of Applicants by Course Category - 2009/2010



Amount Funded By Course Category - 2009/2010



Appendix D

Extract from Special Report No. 74
of the
Comptroller and Auditor General
on the
Department of Education and Skills

Education Fund

6.32 Under the terms of the Agreement, an amount of €12.7 million for an education fund was made available (by the congregations) to be used by the State for educational programmes for former residents of certain institutions⁵⁵ and their families.

6.33 The education fund is held in an investment account managed by the National Treasury Management Agency (NTMA). The value of this fund at 31 December 2009 after taking account of interest earned was €5.4 million. At 31 March 2010, the value of the fund was almost €4.8 million.

6.34 On 17 February 2006, the Minister for Education and Skills established a statutory body – the Education (Former Residents of Certain Institutions for Children) Finance Board (EFB)⁵⁶ to administer the fund. An ad hoc Committee managed the fund until the legislation was in place.

6.35 The functions of the EFB are to

- determine and publish the criteria for the payment of grants
- pay grants to former residents of institutions and their relatives to assist them in availing of educational services
- provide information in relation to educational services for which grants are payable.

6.36 Under legislation⁵⁶, the EFB may offer funding to eligible people to avail of such educational services as the EFB may determine. Funding is offered for a range of approved courses.

- Adult Education, Life Skills, Post Leaving Certificate, Undergraduate and Post-graduate courses.
- Personal Development and Lifestyle courses, Driving Lessons, Literacy courses and One-to-One tuition.
- Primary, post-primary school support programmes.

6.37 As provided for in the 2005 Act, the EFB has devised a set of criteria against which funding allocations are evaluated. Arrangements are in place to review the criteria from time to time (usually annually). The criteria were last reviewed during 2010 to reflect emerging patterns in grant applications and expenditure.

⁵⁶Department of Education and Skills ⁵⁷ This includes €2.48 million incurred under an ad hoc scheme which operated from 2003 prior to the establishment of the EFB on 17 February 2006. In this period administrative costs were not charged to the fund. ⁵⁸ This includes fees and course assistance.

6.38 At the end of 2009, just over 60% of the fund had been spent. In the region of €8.4 million⁵⁷ had been spent in grants⁵⁸. A further €850,000 had been spent on administration costs. A profile of the fund's activities since its inception is shown in Figure 6.8

Figure 6.8 Education Fund

| | € | € |
|--|------------------|------------------|
| Income | 12,700,000 | |
| Contribution | <u>1,858,569</u> | 14,558,569 |
| Interest Earned | | |
| Less Expenditure | | |
| Grants Paid | (8,356,062) | |
| Administration Costs | (850,858) | (9,206,920) |
| Fund Balance at 31 December 2009a | | 5,351,649 |

Note:

a Based on current expenditure trends, the Chairperson of the EFB estimates that funds available to it will be committed prior to the end of 2011 or shortly thereafter.

⁵⁷ This includes €2.48 million incurred under an ad hoc scheme which operated from 2003 prior to the establishment of the EFB on 17 February 2006. In this period administrative costs were not charged to the fund. ⁵⁸ This includes fees and course assistance.

6.38 At the end of 2009, just over 60% of the fund had been spent. In the region of €8.4 million⁵⁷ had been spent in grants⁵⁸. A further €850,000 had been spent on administration costs. A profile of the fund's activities since its inception. This includes €2.48 million incurred under an ad hoc scheme which operated from 2003 prior to the establishment of the EFB on 17 February 2006. In this period administrative costs were not charged to the fund. ⁵⁸ This includes fees and course assistance.

6.39 In the period 2006 – 2009, the EFB has approved 5,532 applications of which 75% relate to former residents and their relatives resident in Ireland. A further 21% are resident in the UK while the remaining are resident in other locations around the world. The distribution of approved grants for the same period was as follows

- Former residents 25%
- Spouses of former residents 4%
- Children (including step children) 60%
- Grandchild/Other 11%

6.40 The EFB carried out an extensive examination of its grants system for the academic/school year ending 31 August 2009. It found that

- 18% of those in receipt of grants to pursue higher education programmes (i.e. at a level equivalent or higher than Level 7 in the National Framework of Qualifications) were former residents while 82% were relatives
- 31% of the funding allocated to higher education programmes was received by former residents and 69% was received by relatives
- the average grant for these purposes was €3,009 for former residents and €2,236 for relatives reflecting the higher limits provided in the Board criteria for former residents
- 52% of applicants in the year were under 26 years of age, 38% were aged between 26 and 54 and 10% were over 55 years
- 26% of all funding for the year was allocated to former residents while 74% went to relatives
- 72% of the funding was for Higher and Further Education with 28% being for other courses including 10% for personal development and lifestyle courses and 4% for driving lessons.

6.41 The Accounting Officer has stated that the EFB will continue for as long as there are funds to meet the demands of former residents and their families for grants to access educational programmes. Consideration will also be given to its future in context of the legislation establishing a Statutory Fund.

