



# **Learning Link Scotland Research Report**

**Performance Information Project for CLD  
*Survey of Management/Performance  
Information Systems – voluntary adult  
learning sector***

## **Performance Information Project for CLD**

### **Aim**

To survey management or performance information systems in use across voluntary sector community-based adult learning.

The survey would aim to gain a comprehensive picture of where and how identification and recording of: inputs, outputs, and outcomes takes place in relation to CLD.

### **Acknowledgements**

Learning Link Scotland would like to thank Communities Scotland for their support, and all the individuals and organisations that kindly gave their time to participate in the research process.

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## 1. Introduction

1.1. This study was commissioned from Learning Link Scotland by Learning Connections in August 2005. The objective was to survey the use of management or performance information systems across voluntary sector community-based adult learning.

1.2. Voluntary organisations almost always have to report on their performance to a number of audiences, including funders and management committees. To do this, they will have to use some form of performance information system to collect and store information and provide data for evaluation and reflection. However, the extent to which individual groups may do this, and the methods they employ, was not clear. Learning Connections wanted to discover the extent of this work, and any barriers to improvement which organisations identified, as well as highlighting good practice and sharing possible solutions.

1.3. Core objectives were identified for the project:

- Survey a substantial sample of Community Learning and Development (CLD) providers;
- Identify how CLD providers currently define, identify and record inputs, outputs and outcomes of CLD activity;
- Identify the current aims of CLD providers in relation to the development of performance or management information systems;
- Report the current stage of development of performance/management information systems;
- Report on the commonalities and differences between the methods and systems used by CLD providers to define, identify and record CLD activity;
- Report the extent to which developments include other partners;
- Identify good practice which could be built upon across the CLD sector;
- Identify priority support and development needs which, if met, could allow CLD providers to develop and use improved management or performance information systems; and
- Identify priority support and development needs which, if met, could allow the co-ordination of management or performance information systems more fully with partners.

## **2. Policy Background**

Key strategic developments are currently taking place, which will have great impact on the voluntary sector, and require organisations to take steps to ensure that their information management systems are robust and sufficient to meet expectations.

Amongst these strategic developments are:

### **2.1. Performance Information Project (PIP)**

The Performance Information Project *for* Community Learning and Development - supporting improved approaches to performance information in community learning and development.

#### **Overall Purpose**

The Scottish Executive has recognised that there is a lack of consistent, reliable information relating to the full range of CLD activity. It is committed to working with others to be able to “assess more fully the contribution of CLD to achieving outcomes” (Scottish Executive, 2004).

With improved performance information in CLD:

- The value of CLD activity can be better demonstrated;
- More responsive services can be developed that better reflect community needs;
- And better information about the impacts of CLD activity will aid the improvement of quality.

#### **Project Aim**

To enhance the information about CLD available at national and local levels through improved approaches to performance information by Community Learning and Development Partnerships and the Scottish Executive/ Communities Scotland.

#### **Project Objectives**

- To develop a national framework to
  - guide CLD partnerships in their approaches to performance information.
  - make the generation of meaningful core data at national level possible.
- To support implementation of that framework by partnerships.
- To enable greater shared understanding of approaches to performance information, through the dissemination of effective practice.
- To establish a programme of longitudinal research to develop better understanding of the impact of CLD.

Source [www.lc.communitiesscotland.gov.uk](http://www.lc.communitiesscotland.gov.uk)

## **2.2. How Good is our Community Learning and Development? 2 (HGIOCLD?2)**

The revised community learning and development proportionate inspection process, currently being developed, will mean that voluntary organisations in receipt of HQ grants from the Scottish Executive and local organisations involved in CLD partnerships will be subject to inspection by HM Inspectorate of Education (HMIe). The revised model is designed to maximise the contribution to the process of self-evaluation and quality improvement by providers of CLD.

Participants will be asked to evaluate themselves against the following questions:

- What key outcomes have we achieved?
- How well do we meet the needs of our stakeholders?
- How good is our delivery of key processes?
- How good is our management?
- How good is our leadership?
- What is our capacity for improvement?

### 3. Methodology

3.1. The research for the study was undertaken through:

- A survey of voluntary organisations engaged in community-based adult learning.
- Focus group discussions with voluntary organisations engaged in community-based adult learning.
- In-depth interviews with voluntary organisations engaged in community-based adult learning.

3.2. Questions for the survey, focus groups and interviews were developed from the brief supplied by Learning Connections, and with reference to frameworks such as *Learning Evaluation and Planning* (LEAP) and Her Majesty's Inspectorate of Education's (HMIE) *How Good is Our Community Learning and Development?*

3.3. The questionnaires were emailed out to participants then followed up with a phone call to prompt responses. In addition, staff offered the opportunity to complete the questionnaire over the phone with organisations to encourage participation. The questionnaire is reproduced at Annex A.

3.4. In total 131 questionnaires were sent out. Thirty-five questionnaires were completed and returned, and five additional organisations gave some details regarding their performance information systems or their reasons for being unable to complete the questionnaire (e.g. "following the loss of our admin worker, there is no-one able to complete this"). As some of these responses were illuminating regarding the barriers some other organisations may have had to responding, these were included in our analysis, where appropriate.

3.5. In a number of cases, organisations requested that the questionnaire be resent to a different individual or part of the organisation. Finding the most appropriate individual within an organisation to answer these questions proved a common difficulty.

3.6. A database was developed for the collation and quantitative analysis of the information gathered through the survey. Issues and themes identified through the questionnaire responses were used to stimulate the focus group discussions, and provided background information for the interviews.

3.7. Three focus groups were held to test out the themes and messages arising from the questionnaires. These were held in Edinburgh, and attracted a variety of different individuals and organisations.

3.8. As part of the focus group development, Learning Link Scotland engaged with InfusionS, a training partnership between The Robert Gordon University, Aberdeen and Queen Margaret University College,

Edinburgh. They provided guidance on shaping focus group questions, and ran a training session on information management for participants.

3.9. It proved difficult to meet the target number of participants for the focus groups, despite offering the first two sessions with free training attached. However, the information provided by the groups proved invaluable, despite lower than expected numbers. It should also be noted that participants at the focus group self-selected (i.e. chose to attend), so were more likely to be aware of the issue of performance/ management information, and how it could be improved in their organisation, and across the sector. In total 17 organisations attended the focus groups.

3.10. Each focus group was asked to comment upon a number of themes and issues that had arisen from the research to date. The conclusions of these sessions augmented the findings of the questionnaires, and provided added depth to some of the issues. In addition, a number of further issues were highlighted.

3.11. The in-depth interviews took place with ten organisations in January and February 2006. These were used to enable interviewees to expand on any of their questionnaire answers and provide examples of their work in this area. They also provided the basis for the case studies included in the report. The organisations interviewed varied in size, focus and location. All of the organisations who took part in the research are listed at Annex B.

3.12. In analysing the data we collected from the questionnaire responses, the focus groups and the interviews, we considered whether the sophistication of an organisation's performance information system was in any way linked to their size (in terms of staff numbers and turnover) or their complexity (the number of projects, multiple locations etc.). We also considered links between funder requirements and performance information systems.

## 4. Findings

The main evidence findings of the study are set out below under seven headings: collection of performance information; storage, organisation and collation; interpretation and evaluation; reporting and promoting; understanding and developing performance information systems; resourcing; and support.

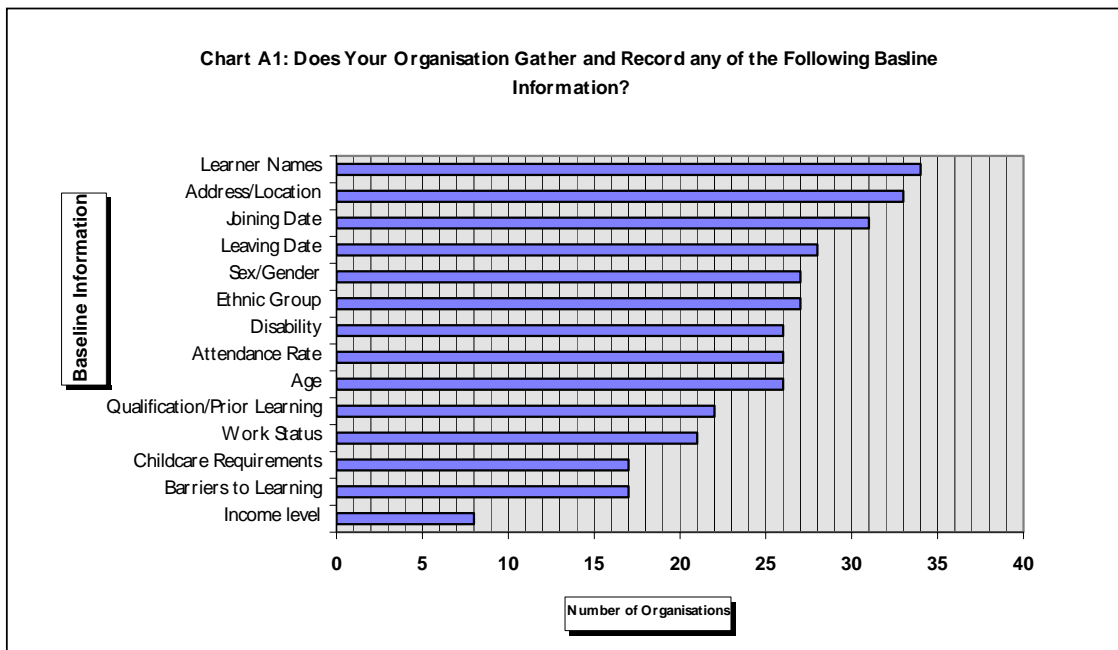
## 5. Collection of Performance Information

### 5.1. Quantitative Findings

Participants were asked at the survey stage about the performance information that they collected in relation to baseline data, inputs, process, outputs and outcomes. The following charts and commentary detail the findings.

#### 5.1.1. Gathering and Recording Baseline Information

All of the 35 organisations who completed the questionnaire gathered and recorded baseline information on their learners. Chart A1 details the categories of baseline information which they recorded.



This information was most commonly collected through application/ registration forms and initial assessments, while a small number of organisations entered these details directly onto individual training/ development plans. In addition, a few organisations used attendance registers to detail joining and leaving dates and attendance rates.

### 5.1.2. Recording Inputs

33 of the 35 organisations who responded to this question stated that they kept a record of information regarding inputs (94%).

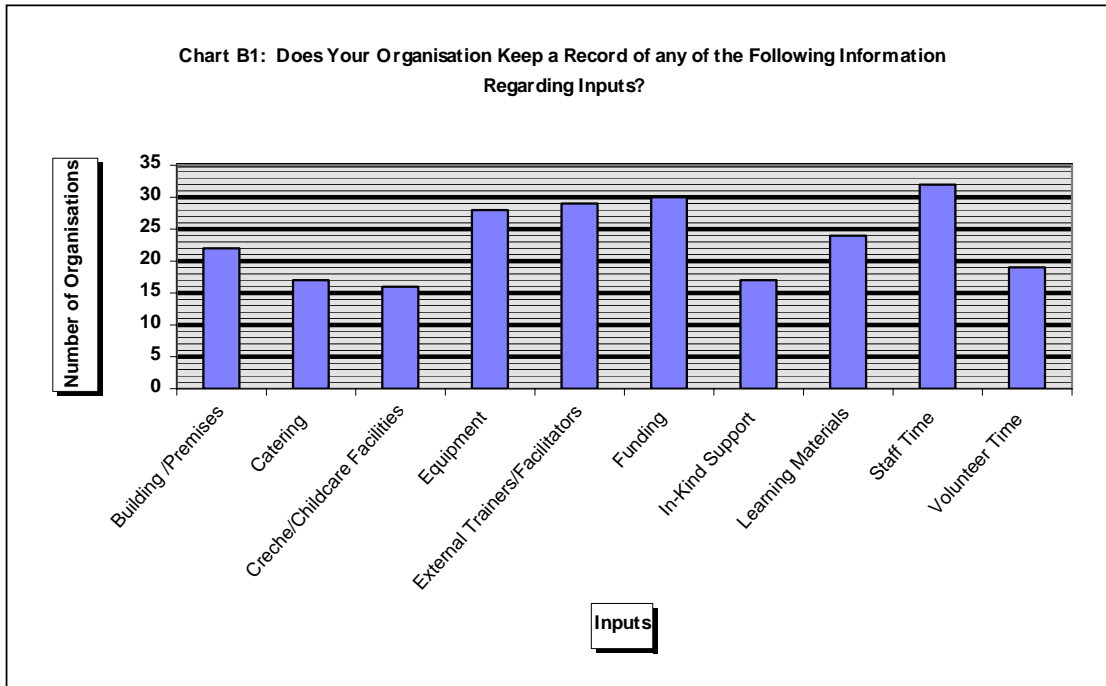
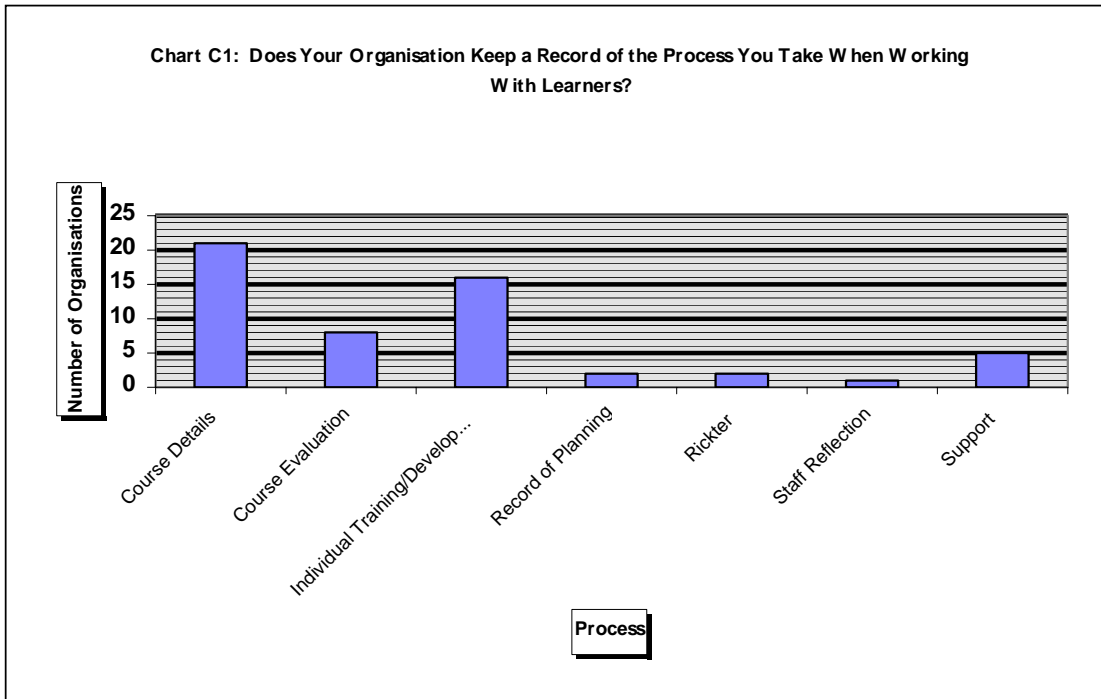


Chart B1 demonstrates that most of the organisations surveyed kept a record of information on various inputs. These records will contribute to an organisation's ability to accurately measure their impact and performance with reference to the resources (human, financial and tangible) that contribute to their services to learners. The survey showed that much of this information was recorded in a variety of individual ways, e.g. in financial records, on timesheets or in contract logs. *(Please note that for this question participants may have given multiple responses.)*

### 5.1.3. Recording Process

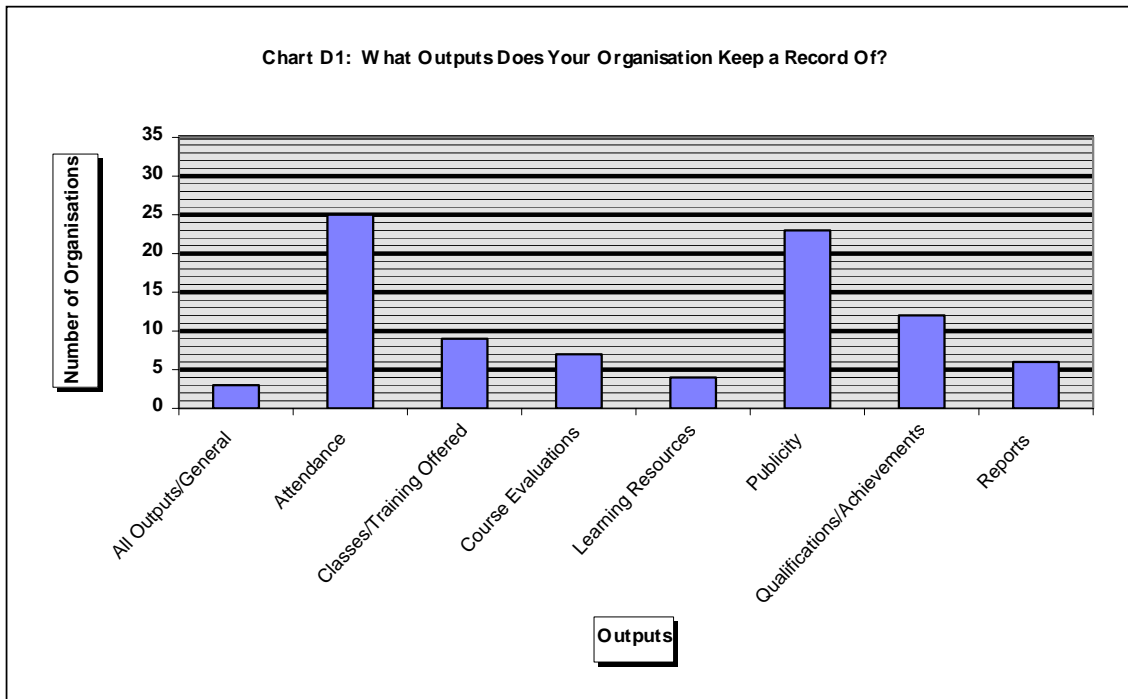
30 of the 35 organisations surveyed stated that they kept a record of the process they took when working with learners (86%).



The most common records kept were course details and individual training/ development plans. *(Please note that for this question participants may have given multiple responses.)*

#### 5.1.4. Recording Outputs

Overall, 94% (33 out of 35) of organisations stated that they kept a record of outputs from their work with learners.



Of those organisations who stated that they kept a record of outputs from their work with learners, 76% compiled information on attendance, while 70% kept a record of publicity produced. In addition 36% recorded the qualifications and achievements attained by learners. *(Please note that for this question participants may have given multiple responses.)*

#### 5.1.5. Defining Inputs, Process, Outputs and Outcomes

In our questionnaire we asked participants for information relating to their inputs, process, outputs and outcomes. These terms, and the definitions we supplied, were in reference to the use of those categories in *Learning Evaluation and Planning (LEAP)*. However, it was noted that in a small number of cases, there was some confusion over the terms or instances of duplication between categories. While most organisations had a clear grasp of these terms, it may be that definitions would have to be offered by any group (e.g. funders, regulators etc.) seeking to request information under these categories.

## **5.2. Qualitative Findings**

In addition, focus group participants and some of the organisations interviewed provided details of further issues relating to the collection of performance information. The most common issues identified by participants included:

### **5.2.1. Data Protection/ Confidentiality**

Participants were very aware of the duties placed on them to comply with data protection legislation, and were often anxious about the implications that an internal electronic system or an external collation system would have on maintaining these standards.

### **5.2.2. Evaluation with Learners**

A specific need was identified by organisations working with certain groups of learners for whom group and individual evaluations could be problematic. These included groups working with learners who are deaf or hard of hearing, who have limited command of written or spoken English or who have literacy issues. For these organisations, collecting feedback from learners on their experiences, progression and comments on the organisation's performance proved more complex than asking them to complete evaluation forms or take part in discussions (the methods used by most other groups). They specifically requested guidance on available participative evaluation methods and tools, which would help them to fulfil this key area of assessing their performance.

### **5.2.3. Soft Indicators/ Qualitative Data**

A number of organisations felt that there was a conflict between the collection of quantitative and qualitative data which would be used to evaluate their performance. While they saw the benefits of improved IT systems which would help them to track and collate quantitative data, they often saw qualitative data as richer and more useful in gaining an insight into the impact of their work on learners. However, it was felt that this was often not valued to the same extent by funders, who favoured quantitative data. One focus group participant, referring to this anomaly, stated, "I want to tell them stories, but they just want numbers".

They wondered how qualitative data, including progress against soft indicators, could be managed more effectively. It was also noted that qualitative data was often more resource-intensive to collect.

One organisation felt strongly that a performance information system would not directly provide information on the impact of their services on individuals or communities, as this would come from more qualitative data, and long-term follow-up with learners.

### **5.2.4. Long-term Impact/ Follow-up**

A number of organisations saw learner follow-up as a key task in determining the long-term impact of their work. Where this was a

funded component of their project, they collected this information systematically. In addition, those organisations who were not funded to carry out follow-up work often expressed a keen interest in doing so. The need for imaginative ways of improving response rates to long-term follow-up (letters, even with stamped addressed envelopes had yielded few responses), and the time-intensive nature of this process were raised as key barriers to organisations being able to accurately measure the long-term impact of their work.

One organisation, who had carried out a ten year follow-up process with selected learners, found the responses invaluable in demonstrating their contribution towards longer term impacts which they had previously been unable to claim.

For two of the organisations interviewed, follow-up was an important part of their measurement of performance, but they found this challenging due to learner groups with “chaotic lifestyles”. Their ability to carry out this task is curtailed by the transient nature of their learners. In another case, an organisation working with older people, and those with Alzheimer’s found follow-up difficult due to memory-related issues.

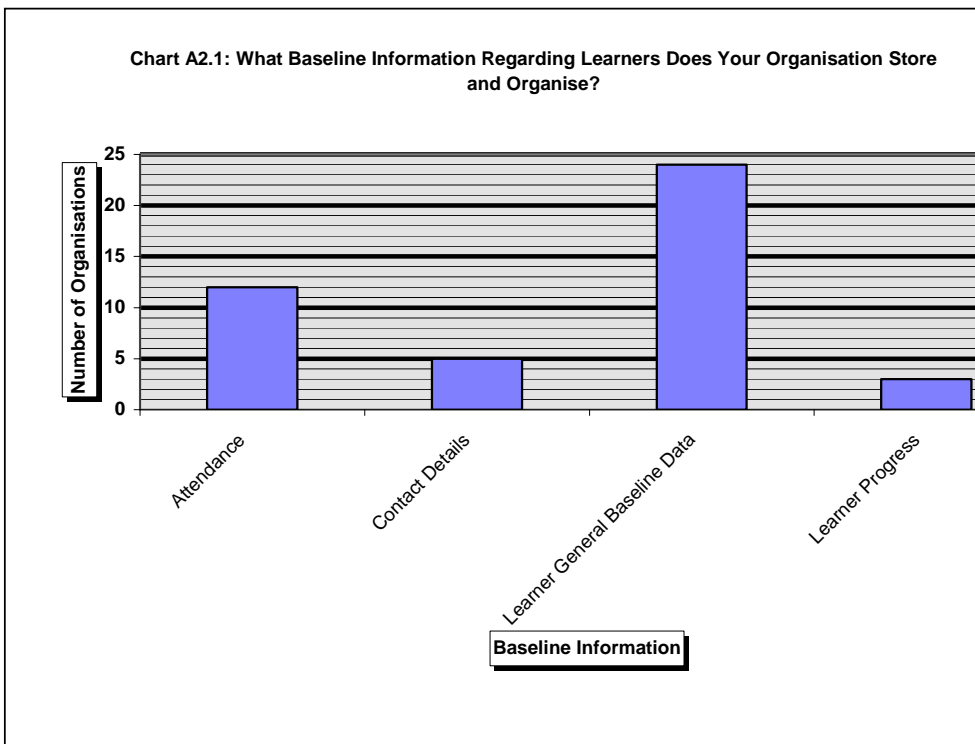
## 6. Storage, Organisation and Collation of Performance Information

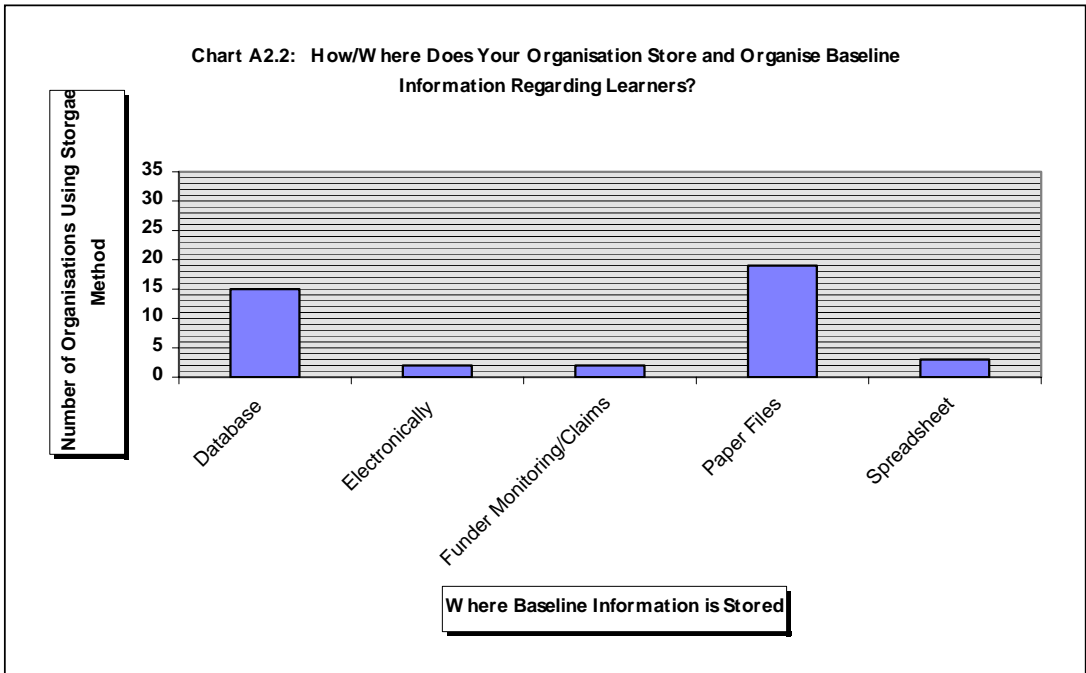
### 6.1. Quantitative Findings

Participants were asked through the survey about the methods and systems they used to store and organise performance information. The following charts and commentary detail the findings.

#### 6.1.1. Storing and Organising Baseline Information

91% (32 out of 35) of respondents stated that they stored and organised baseline information regarding their learners. 30 of those organisations gave further details regarding what information they stored and organised, and how they do that (see Charts A2.1 and A2.2 below).

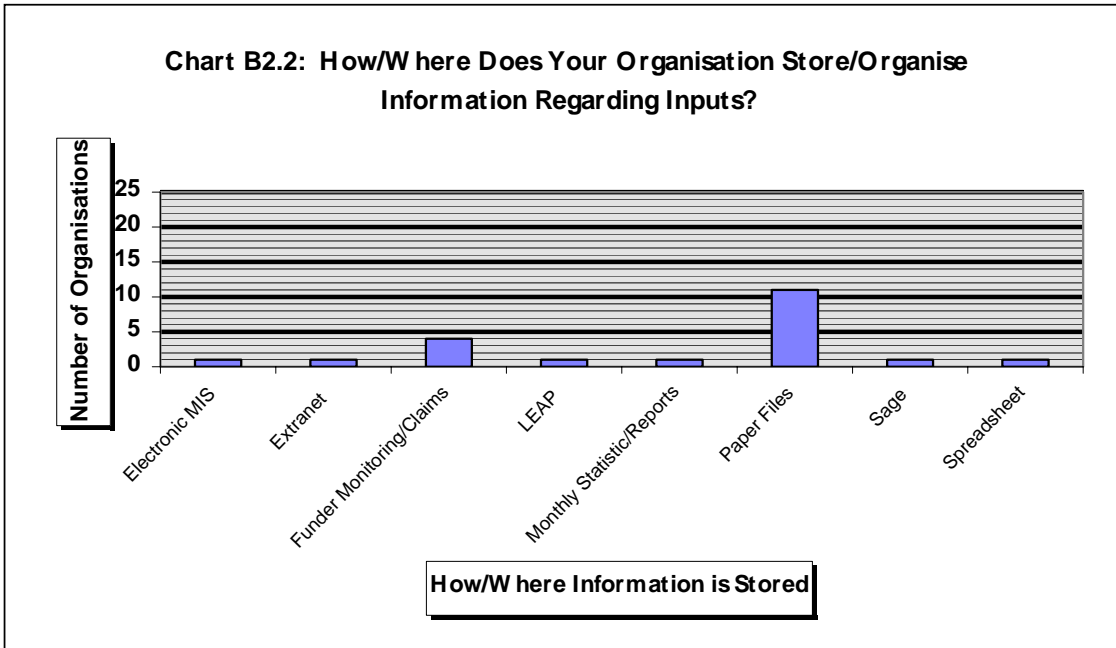




In addition, Chart A2.2 shows that a majority of organisations (54%) store baseline information in paper files, rather than electronically. This would seem to be due to the method of collection of this information – often on application forms or initial assessment forms completed by staff during interviews with learners. However, the fact that 15 organisations (43% of respondents) stated that they stored this information in a database showed the progress towards using electronic methods of storage, which may demonstrate willingness to develop more comprehensive performance information systems.

### 6.1.2. Storing and Organising Information Regarding Inputs

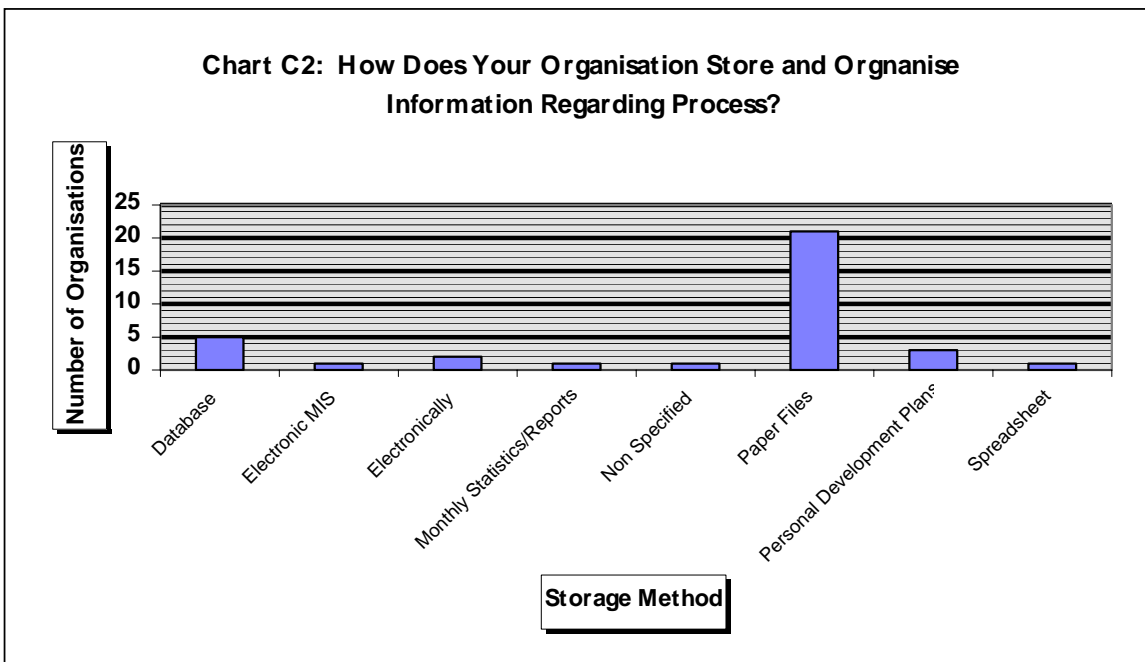
Of the 34 organisations who responded to this section, 28 (82%) stated that they stored and organised information regarding inputs.



Again, records of inputs appeared to be mainly stored in paper files. (See Chart A2.2)

### 6.1.3. Storing and Organising Information Regarding Process

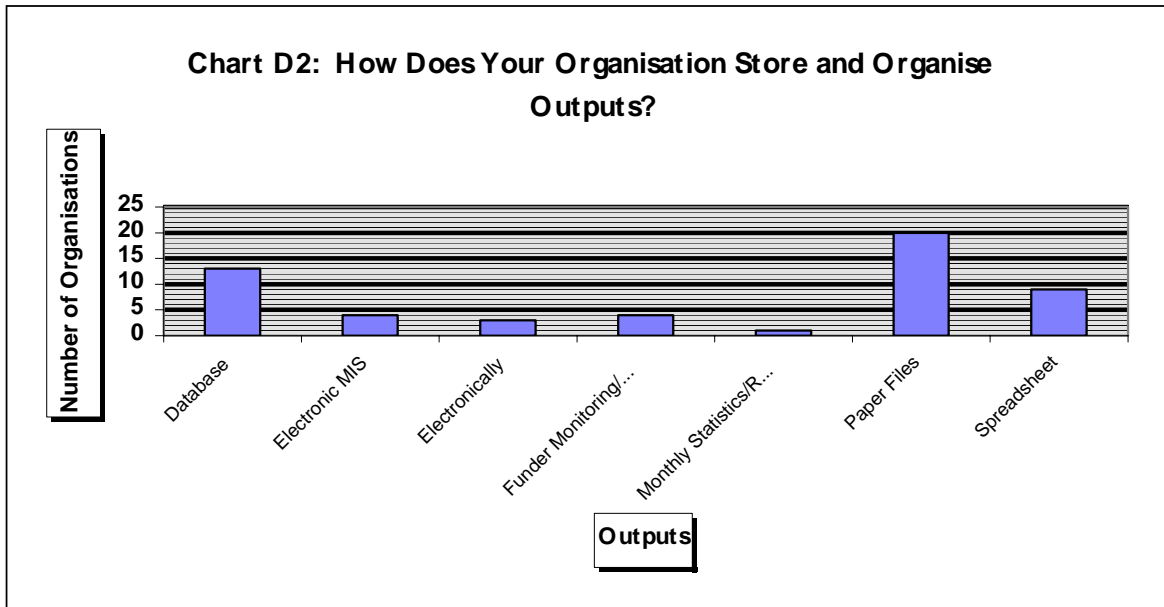
29 of the 35 organisations who responded to this section stated that they stored and organised information regarding process (83%).



Overwhelmingly, the majority of process records were stored in paper files (72%), with a minority (17%) stored in a database. Again, this seems to be mainly due to the fact that much of the information is originally collected on paper.

#### 6.1.4. Storing and Organising Information Regarding Outputs

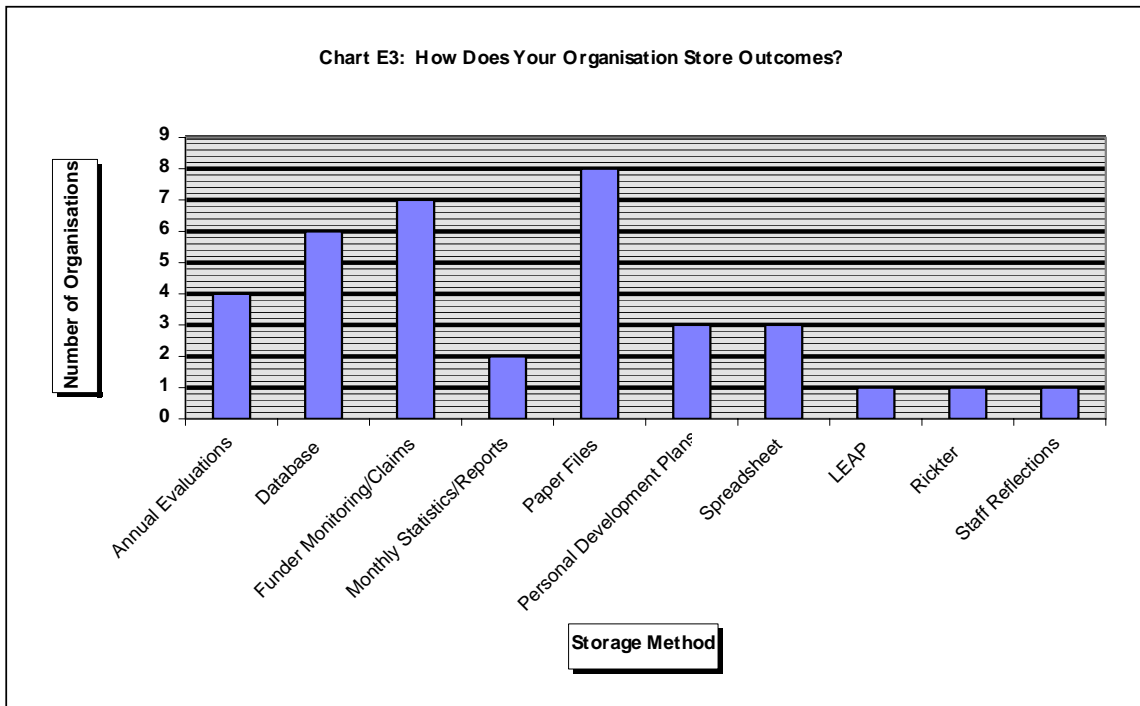
30 of the 33 organisations who responded to this section stated that they stored and organised information regarding outputs (91%).



While paper filing methods were again the most popular method for storing information on outputs (65%), 42% of organisations stated that they used a database for this task, 29% used spreadsheets and 13% had a dedicated management information system (MIS). *(Please note that for this question participants may have given multiple responses.)*

### 6.1.5. Storing and Organising Information Regarding Outcomes

26 out of the 35 organisations who responded stated that they stored and organised information regarding outcomes.



In reference to this question regarding the storage of information on outcomes, 23% reported using a database for this task, while 31% used paper files and 12% used spreadsheets. Other significant findings showed that 27% used funder monitoring/ claims to demonstrate their progress against agreed outcomes, while 15% carried out annual evaluations against set outcomes.

## 6.2. Qualitative Findings

In addition to these results, focus group participants and some of the organisations interviewed provided details of further issues relating to the storage and organisation of performance information. The most common issues identified by participants included:

### 6.2.1. Paper/ IT Systems

Even those organisations who had the most fully developed electronic systems often relied on paper-based forms and files in some instances. This was particularly the case for organisations where individual learners required to have access to, and/or update their personal files. It was observed by one group that duplication was inevitable, as they are still required to hold paper records in order to “remain fully accountable”, even where these had been entered onto an electronic system.

In some cases organisations who had limited financial resources had systems which were paper-based, but were highly developed to store, collate and produce the information they required to measure and report on their performance. While these systems often necessitated a higher level of staff input to extract the relevant information, they were capable of responding to requests for information, and satisfying the needs of the organisation to measure performance. In these cases it was acknowledged that IT resources would benefit the system in terms of time and ease of access to quantitative analysis in particular.

### **6.2.2. Separate/ Duplicated Systems**

Organisations had often developed systems, of varying levels of sophistication, to collect, collate and evaluate their services. However, it was also the case that many organisations had a number of separate or duplicated systems running simultaneously. This is often because information is collected, collated and reported on a project, rather than an organisational basis.

### **6.2.3. IT Skills/ Training**

A key issue identified by almost all participants (nine out of ten interviewed, and all three focus groups) was the need for IT skills and training to take forward the development of high quality performance information systems. Where organisations had staff with in-house knowledge of IT, this was often utilised to support their information systems, and meet any training requirements for other staff. Where this skill was lacking, organisations saw it as a key barrier to developing and utilising more sophisticated systems. The need for IT training was identified at two levels: advanced level for those who may require to build/ develop new systems or manipulate data, and beginners level for those who were required to input to the systems.

Organisations, particularly those with limited resources to devote to staff training, often operated a cascade system, where a member of staff within an organisation would train others in a particular skill or to use a specific system. This was seen as a way of reducing costs without neglecting training requirements.

In addition, a few organisations expressed a need for sharing of ideas and solutions in this area. It was felt that while peer support was available for development workers and those dealing directly with learners, it was more difficult to share good practice on organisational development issues such as managing information, developing systems and internal communications. A discussion on this topic at one of the focus groups led to calls for the publication of guidance and good practice examples for organisations in evaluation, internal systems and managing performance information.

#### **6.2.4. IT Equipment/ Software**

In common with IT skills and training, a need for IT equipment and software or funding for capital equipment, was identified as a key barrier to development. While most organisations had access to some form of IT equipment, this was often basic and in need of upgrading. One organisation specified that awareness of the need to meet ongoing costs for IT sustainability and upgrades was seen as a key factor in the development of a more sophisticated electronic system. The ability of multi-location organisations to share documents and systems was also raised by a number of participants. This often required workers in outreach areas to send email or hard copies of data to a central admin function, where it was inputted, as they were unable to input directly themselves. While this system is usually tightly controlled it does create duplication of paper and electronic records, as well as extra demands on staff time. In one organisation, staff or sessional tutors in some geographical areas did not always have access to organisational facilities with IT equipment, and so were heavily reliant on paper-based forms to share information with the core organisation.

#### **6.2.5. Partnership Working**

One of the groups interviewed had experience of leading a partnership project with other organisations. They highlighted the importance of identifying responsibility for the management of performance information for organisations in this situation. The lead organisation is often reliant on others to submit the correct information in a particular format in order to meet their own targets (e.g. reporting to funders) so they need to factor in time to ensure that this happens, as well as to collate the information.

Where organisations were working in partnership, but were not the lead organisation, they had to provide information to the lead organisation for central collation. In one case, an organisation raised concerns over the confidentiality issues this raised for service users, and what other uses the information may be put to. This issue was also raised by a large number of focus group attendees.

Another issue raised in relation to partnership working was the opportunities it sometimes presented in terms of tracking learners' progression. When an organisation is aware that a learner has progressed to a new opportunity with another partner provider, that information can be used to demonstrate the impact of their work in moving the learner on. However, this is also subject to confidentiality issues, and can sometimes be problematic in those terms.

#### **6.2.6. Purchasing Performance/ Management Information Systems**

Of those organisations surveyed and interviewed three were using, or planning to use, performance/ management information systems which had been bought in from external contractors. In most cases this had

provided a solid base for a system, and organisations had negotiated ongoing support as part of this package, so were able to request updates and additions to be made to the system to adapt to changing needs and priorities. However, some organisations had experienced problems where systems developed for them were not fit for purpose or quickly became obsolete. It appears that the ability of an organisation to conceive of a system to meet their needs, and communicate this to an external contractor was key to developing a useable system. It is also important that the contractor selected fully understands the remit, and the nature of the organisation in order to provide a responsive system. These issues also arose in a few cases where organisations had asked volunteers, or staff members with a particular outside interest in IT, to develop systems for the organisation.

One organisation is currently working with Glasgow Caledonian University to develop a system to measure 'distance travelled' by learners, which will contribute to their ability to measure the performance of the organisation in achieving soft outcomes.

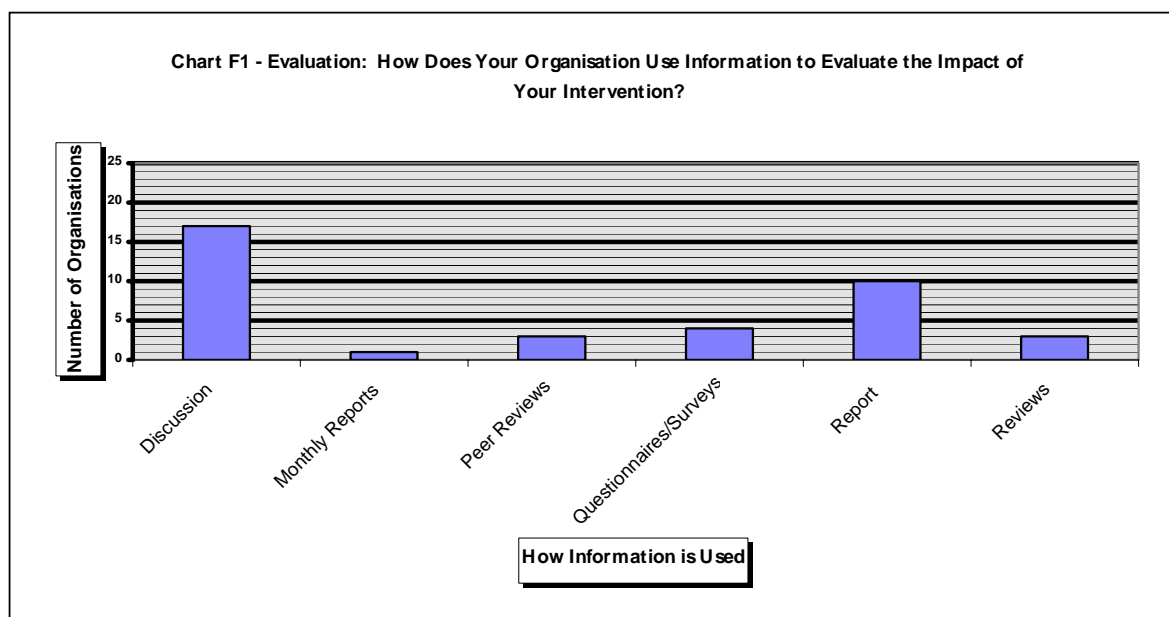
## 7. Interpretation and Evaluation of Performance Information

### 7.1. Quantitative Findings

Participants were asked at the survey stage about how they used their performance information to evaluate the impact of their work. The following chart and commentary detail the findings.

#### 7.1.1. Using Performance Information to Evaluate Impact

91% (32 out of 35) of organisations stated that they used their performance information to evaluate the impact of their work with learners.



Half of respondents (50%) stated that they discussed the findings of their performance information within the organisation in order to evaluate the impact of their work. A significant proportion (31%) also produced reports to highlight findings.

### 7.2. Qualitative Findings

In addition to these results, focus group participants and some of the organisations interviewed provided details of further issues relating to the evaluation of organisational performance. The most common issue identified by participants was:

#### 7.2.1. External Assessment

A few organisations expressed a wish to commission external evaluations of their projects and/or organisations to achieve an unbiased picture of their performance. While this would still require a high level of performance information management on the part of the organisation, the stage of analysing the information and using that

analysis to make a judgement on performance would be independent from those providing the service. While some organisations indicated that they had secured funding to carry out this kind of exercise, others had been unable to do so.

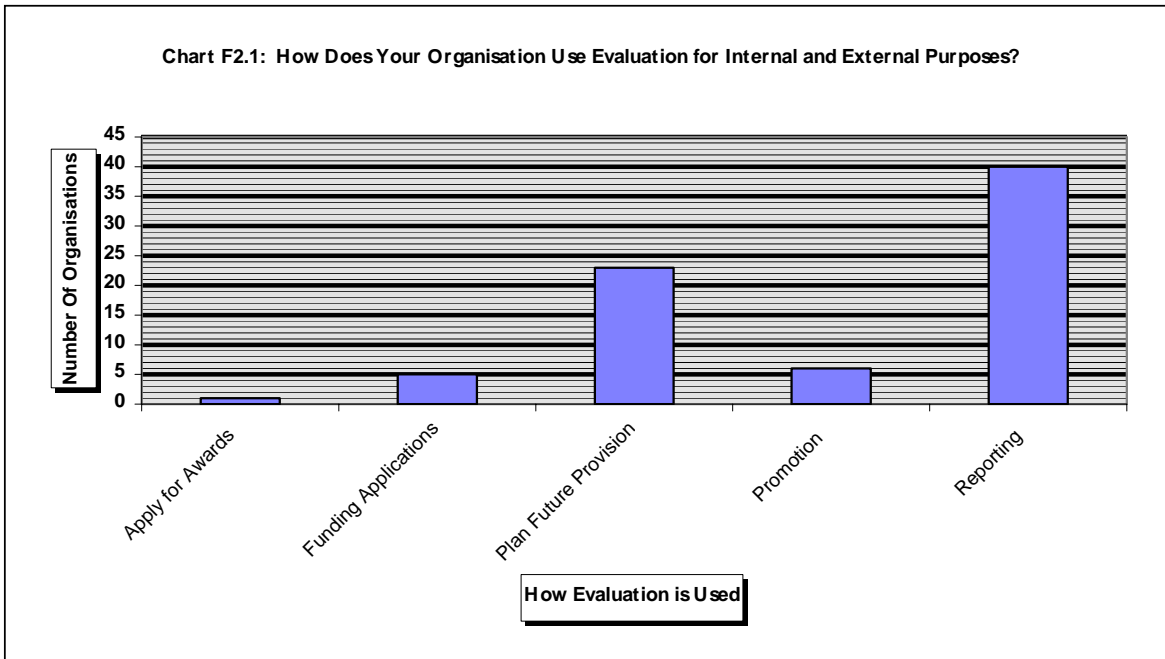
## 8. Reporting and Promoting Performance Information

### 8.1. Quantitative Findings

Participants were asked at the survey stage about how they used evaluation of their performance for external and internal purposes. The following charts and commentary detail the findings.

#### 8.1.1. Using Performance Evaluation

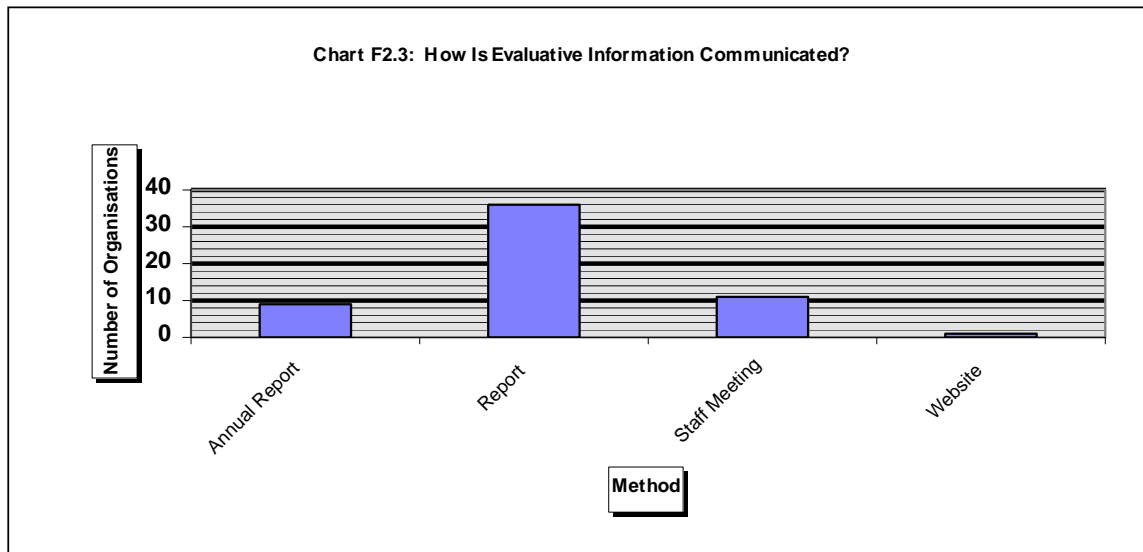
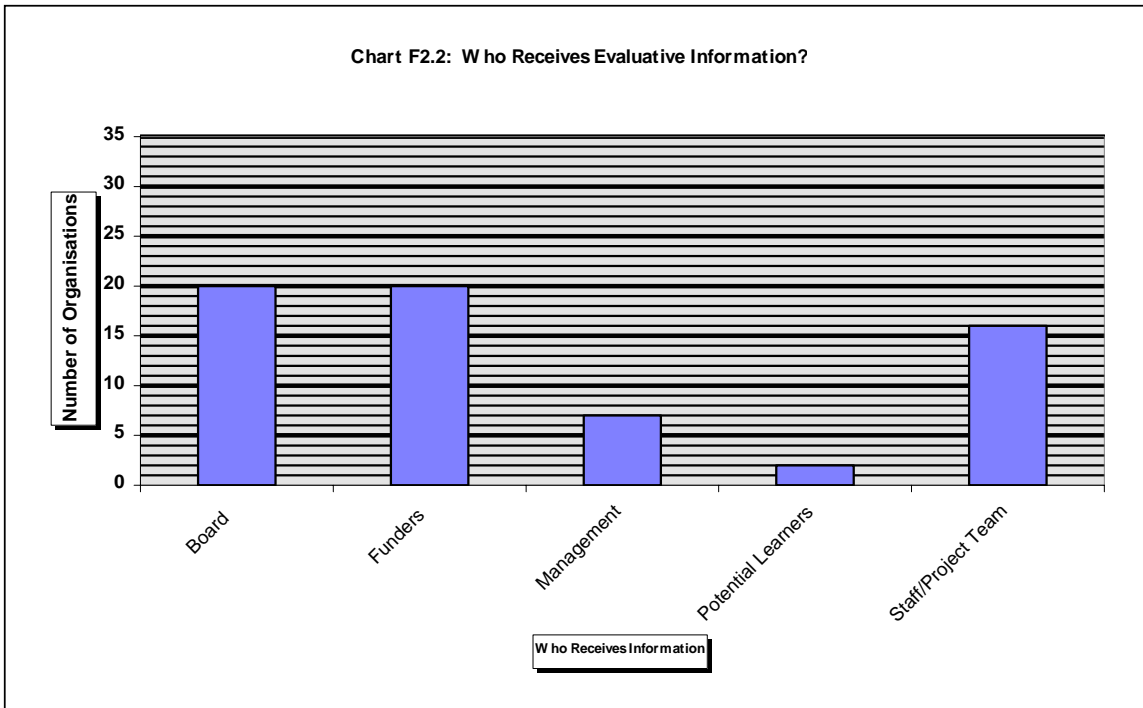
91% (32 out of 35) of organisations stated that they used their performance information to evaluate the impact of their work with learners.



The most common use of evaluations was for reporting purposes. However, a sizeable number of organisations also specified that they used evaluations of their work to plan future provision. Smaller numbers stated that they used evaluation findings for promotional purposes and funding applications.

### 8.1.2. Communicating Performance Evaluation

32 organisations described how, and to whom they communicated their evaluative information (see Charts F2.2 and F2.3 below)



The most frequent recipients of evaluation reports were jointly boards/ management committees and funders. In addition, some organisations stated that this information was made available to staff/ project teams and management.

## **8.2. Qualitative Findings**

In addition to these results, focus group participants and some of the organisations interviewed provided details of further issues relating to the reporting and promotion of performance information. The most common issues identified by participants included:

### **8.2.1. Multiple Funders' Requirements**

For most voluntary organisations, reporting to multiple funders on performance against agreed targets is standard practice. It was acknowledged that variations in what information funders required, as well as how and when they requested information, often presented a barrier to the development of a single system to manage performance information. For one organisation this created a tension between their wish to develop a single system for their own ease of use and to allow them to measure performance across the whole organisation, and their need to “retain the ability to report separately” on different projects.

It was also the case that certain funders required organisations to enter data onto their own systems for collation. In these circumstances, organisations are required to either use this separate system for one service, or duplicate the information they are inputting.

### **8.2.2. Reporting Framework for Funders**

At the first focus group there was a discussion about whether it would be useful for funders to develop a common reporting framework for voluntary organisations. It was felt by most attendees that this would reduce the burden of multiple reporting methods on organisations, and allow for the smoother development of fully integrated performance/ management information systems. However, participants recognised that funders' requirements and the outputs/ outcomes they set are often dependent on the individual funding body's aims and objectives, and that a common system may not be appropriate for all funders. In contrast, some participants felt that a single system for reporting performance and impact could stifle creativity, and that the unique aspects of an organisation's work could go unrecorded.

### **8.2.3. Using Performance Information**

In addition to needs directly linked to the management of performance information, some organisations identified other related issues. One of these was the use and presentation of performance/ management information as a promotional tool (e.g. to learners, to potential funders, within the wider organisation etc.). One organisation stated that they “have data available in various systems, but haven't found a way to adequately express the impact of what we do”. The ability to analyse performance information, and use the findings to demonstrate impact outwith the organisation required consideration of the language used, the needs of each audience and the key messages the organisation wants to portray.

In one case, an organisation felt that their ability to collate and provide quality performance information on demand would contribute to their profile as a well-managed and professional organisation.

Performance information was also used in many of the organisations surveyed to feed into future planning and to provide information on staff and organisational performance and achievements.

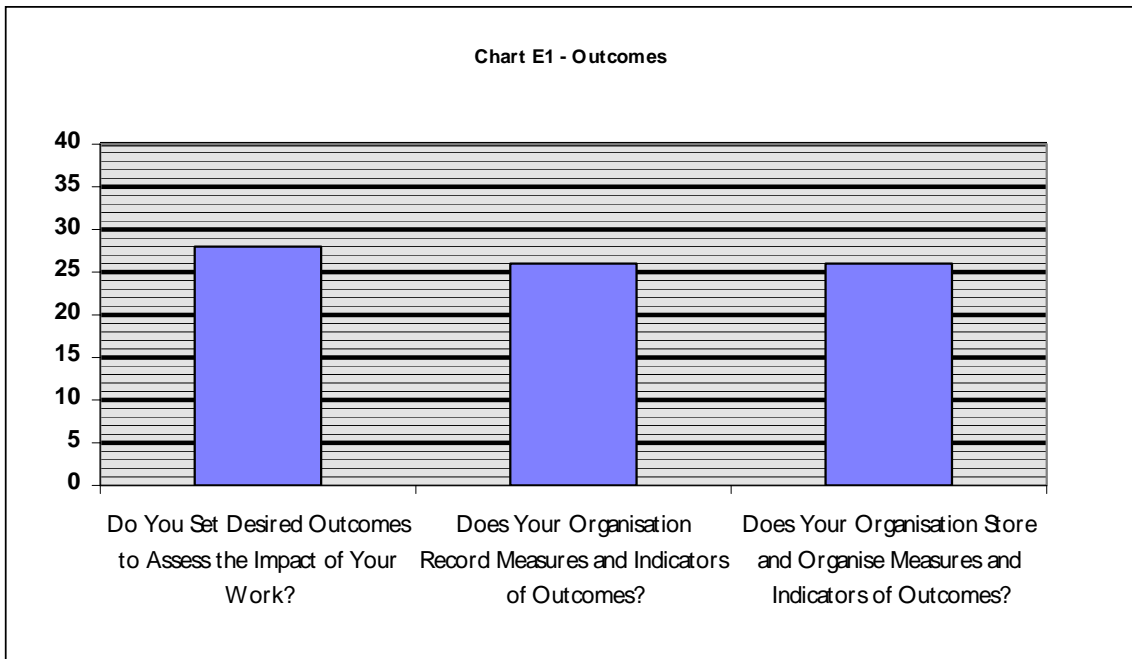
## 9. Understanding and Developing Performance Information Systems

### 9.1. Quantitative Findings

Participants were asked at the survey stage about setting desired outcomes for their work, and about their organisation's capacity to manage their performance information. The following charts and commentary detail the findings.

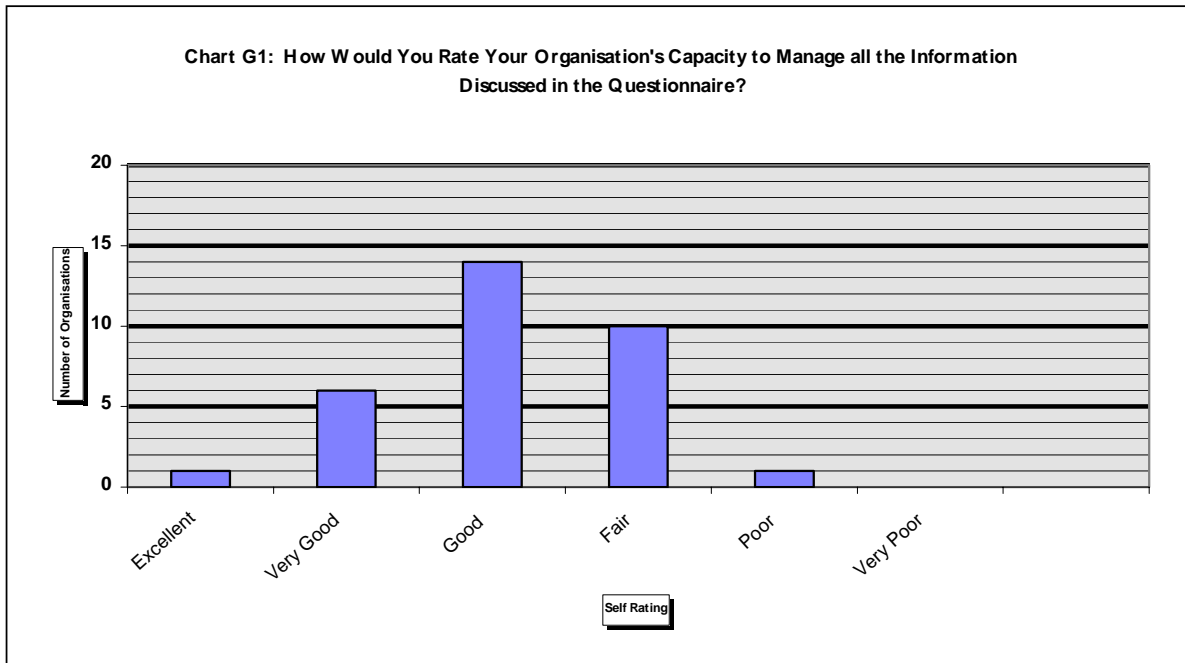
#### 9.1.1. Setting and Measuring Outcomes

Chart E1 demonstrates the number of organisations who stated that they set desired outcomes to assess the impact of their work (28 out of 35 – 80%); the number who record measures and indicators of outcomes (26 out of 35 – 74%); and the number who stored and organised measures and indicators of outcomes (26 out of 35 – 74%).



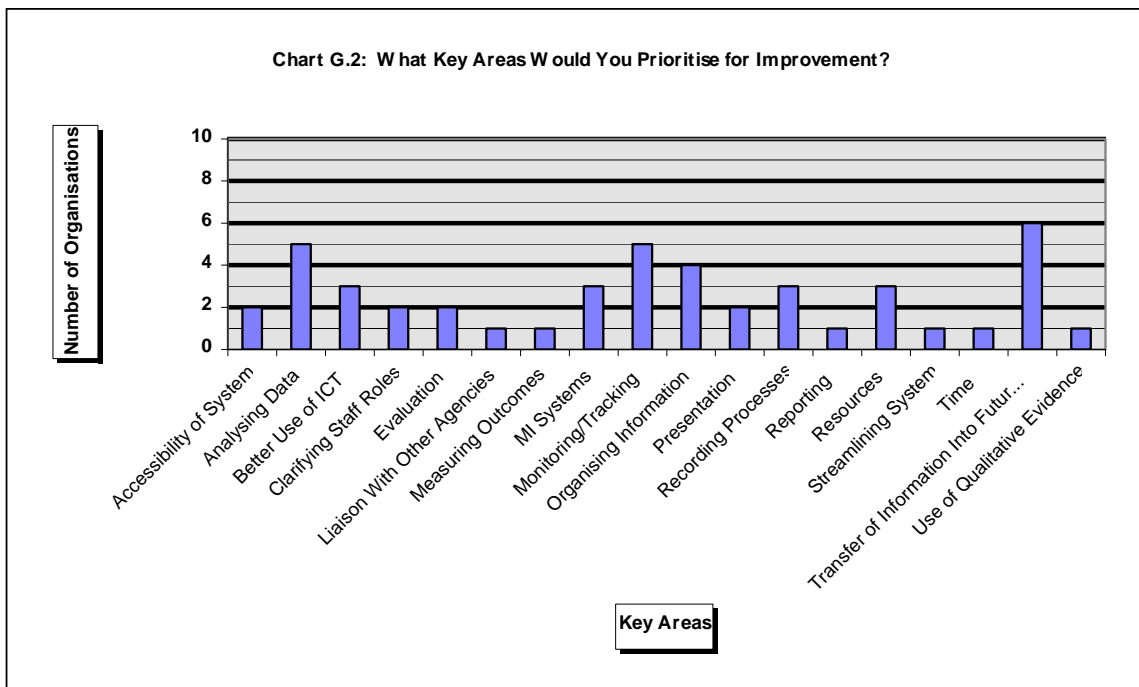
## 9.2. Organisational Capacity to Manage Performance Information

In total 32 respondents rated their organisation's capacity to manage all of their performance information.



- 3% rated their capacity as “excellent”
- 9% rated their capacity as “very good”
- 44% rated their capacity as “good”
- 31% rated their capacity as “fair”
- 3% rated their capacity as “poor”
- no organisations rated their capacity as “very poor”

25 organisations provided information on key areas they would prioritise for improvement. These are detailed in chart G2.



While the specific areas highlighted for improvement varied greatly between organisations, some common themes arose. A number of organisations wanted to improve their ability to transfer performance information findings into future planning, while others sought improvements in monitoring/ tracking learners, organising information and analysing data.

Other areas for improvement identified by multiple organisations included better use of IT, MI systems, recording processes and resources.

### 9.3. Qualitative Findings

In addition to these results, focus group participants and some of the organisations interviewed provided details of further issues relating to understanding and developing performance information systems. The most common issues identified by participants included:

#### 9.3.1. Internal/ External Drivers

The drivers for developing performance/ management information systems can be divided into two main groups: internal and external. The drivers within a particular organisation may be a mixture of both of these groups.

Internal drivers include requests for information from an organisation's board or management, as well as requests from staff or learners to measure progress against targets.

External drivers mainly come from funders' requests for reporting against agreed targets. Where the monitoring and evaluation required to meet funders' requirements is complex, this has often been a key driver for an organisation to develop a system that will manage their information. In some cases, organisations were currently subject to, or may face future inspection against quality frameworks such as HMIE's *How Good is Our Community Learning and Development?*, *The Big Picture* or PQASSO [Practical Quality Assurance System for Small Voluntary Organisations].

Participants at focus groups who had used quality assurance standards found those helpful in working through some of the processes required to manage information effectively and use it to its best advantage in demonstrating impact.

One organisation, reflecting on the importance of effective performance information management said, "our continued existence and ability to provide quality training for our clients depends on our accurate retention of all records".

### **9.3.2. Development of Performance Indicators**

For the vast majority of organisations their day-to-day performance indicators were shaped primarily by the requirements of their funders. Where these were felt to provide only part of the picture, some organisations developed additional performance indicators, used mainly for internal purposes. These were often measured through soft indicators and distance travelled.

One organisation expressed their use of performance indicators as defining 'what do we want to do?' then asking 'how will we know when we've done it?' This process was utilised across the sample, where organisations sought to demonstrate the impact of their work through intermediate outcomes and indicators.

Other organisations defined performance indicators based on discussions with their learners. Learners, in collaboration with staff, set desired outcomes at the start of their interaction with the organisation, and this was used as a basis for measuring progress, both for the learner and for the organisation. In this way, the organisation could see whether the learner had achieved the outcomes that they hoped for, and indicated the organisation's performance in terms of providing opportunities and assisting the learner to meet those goals. These outcomes could be either hard (e.g. move into work, achieve qualification etc.) or soft (e.g. improved confidence, interpersonal skills etc.).

A number of organisations stated that they compiled development plans for the organisation, which detailed outcomes and performance indicators for the year, along with the activities to be undertaken to meet them. In some cases these plans were developed in partnership with funders or partner organisations/ stakeholders.

### **9.3.3. Prompting Consideration of MI Systems**

Of those surveyed a small number (four) indicated on their questionnaire that they had found the process of responding helpful in getting them to reflect on their current practice in relation to the management of performance information, and to think what could be developed in the future. This was backed up by similar comments at the first focus group. Providing space for an organisation to think about what information they currently collect, manage and produce, and what gaps might exist, can be an important stage in the development of effective performance/ management information systems, and can aid the planning process.

### **9.3.4. MIS and Organisational Development**

The stage an organisation is at in its development could be seen as impacting on its motivation and ability to devote time and resources to developing or upgrading its performance/ management information systems. Some organisations who were looking to, or in the course of developing systems identified themselves as being at a “review” stage in the life cycle of the organisation. For groups who felt unable to progress this at present, it was often because they were concentrating on developing the services the organisation provides, and other front-line activities. This was often the case with newer organisations, or those who were recovering after organisational difficulties (e.g. loss of funding, high staff turnover etc.).

## **10. Supporting Performance Information Management**

### **10.1. Qualitative Findings**

Focus group participants and some of the organisations interviewed provided details of issues relating to the internal and external support for performance information management. The most common issues identified by participants included:

#### **10.1.1. Individual Leadership**

In three organisations, a key factor in driving forwards the development and improvement of performance / management information systems was the external work of a particular individual within the organisation. Two of the organisations interviewed (and one surveyed) had members of staff who had undertaken study outside of work, and used that opportunity to consider MIS/ quality systems in their organisations. This provided key benefits in terms of investigating the needs of the organisation, and providing possible solutions and recommendations. These individuals also continued to drive this work after the completion of their projects. While this was seen as a key strength, and the study was supported by the organisations, it should be noted that this drive came from the individuals themselves, and created a separate forum for them to look at this issue, outside of their usual work time.

One organisation which was looking to develop an electronic performance/ management information system acknowledged that much of the time spent on it would be outside of normal working hours, and would form an individual project for one member of staff, as the time for this to happen alongside other ongoing tasks, or financial resources to use an external contractor were unavailable.

#### **10.1.2. Relations with Funders**

The relationship an organisation has with its funders emerged as a key determinant for the development of MIS systems for reporting purposes. Two organisations, both funded primarily through their local authorities, had vastly different experiences of this influence. One organisation, with a positive and supportive relationship with their local authority funders, stated that the continuity of officers had aided the development of good partnership working, and that the officers have been particularly supportive of their work to develop their performance/ management information and quality assurance systems.

In another case, where an organisation had seen a high turnover of local authority officers to forge links with, the relationship was less supportive, and the organisation often felt they were being asked for duplicate or additional performance information at short notice, which hampered their ability to develop a single system to manage their information.

### **10.1.3. Organisational Change**

A key issue for organisations planning to develop and improve their performance/ management information systems is the impact that this will have on the organisation as a whole, and on individual staff roles. There was concern that new systems would require a higher level of administrative work, and this may detract from time spent on the delivery of front-line services. One organisation stated that the introduction of a single computerised MIS would “radically change how people work”, as it would have an impact on all the systems needed to feed it (e.g. attendance records, course evaluations etc.).

Ownership of systems and processes and staff ‘buy-in’ to their use was raised at one of the focus groups as affecting the ability of an organisation to operate effectively in this area. Ensuring that staff know what outcomes they are required to achieve, and how the organisation will report those to funders, can help in motivating staff to collect and collate the information to demonstrate their work and performance.

### **10.1.4. Short-term Funding**

The short-term nature of much voluntary sector funding was seen to have multiple impacts on organisations’ abilities to develop and maintain effective performance information systems. Of the ten groups interviewed, five saw a link between their funding and their ability to produce quality performance information.

Short-term funding had often resulted in a high turnover of staff within the organisation which had implications for training, the development of new systems, and crucially, continuity. A new member of staff in one organisation interviewed expressed particular difficulty in taking over from an established worker, as systems were often based on tacit knowledge or individual workers’ files, rather than a comprehensive system which could be accessed by everyone.

In addition, where short-term projects were funded, it often seemed easier to create separate systems for reporting performance than try to integrate the new project into an existing system.

At an organisational level, short term funding was also seen by some groups as a barrier to forward planning, which included the development of performance/ management information systems.

## **11. Resourcing Performance Information Management**

### **11.1. Qualitative Findings**

Focus group participants and some of the organisations interviewed provided details of issues relating to the resourcing of performance information management. The most common issues identified by participants included:

#### **11.1.1. Staffing Performance Information Management**

One group stated that they “want to focus on achieving outcomes rather than the work to support demonstrating them”. While a number of groups saw the direct benefits which managing their information could bring to their ability to provide high quality services to their learners, the management of performance information was often seen as an additional activity, which reduced staff time spent on front-line provision. This was particularly the case in smaller organisations with less administrative resources, and where it was often development workers who had to manage their own information. For one group, this was seen as “a waste of resource”, so while necessary, was kept to a minimum.

This view may be shared by funders. Some organisations stated that they had struggled to demonstrate the need for additional administrative staff, who often manage and support the performance/management information system, as their impact on the service users could not be quantified in the same way as that of a development or outreach worker. It was also noted that the development and implementation of a new system could require project management from within the organisation, which is an additional resource, and similarly difficult to fund.

However, one organisation stated that they had set aside dedicated time each week for workers to input and update the information they collected on their work, and saw this as a dedicated investment on an ongoing basis, which pays dividends when the collated information is required, as it is readily available. For another group, the ideal was clear; they “need a system that works and provides the information, but doesn’t create extra paperwork”.

One large organisation was considering the creation of a ‘data manager’ post to take overall responsibility for their performance/management information systems, and ensure the integrity of the system and the data contained within it.

Participants at one of the focus groups agreed that funders do not always recognise the real cost of effective evaluation and management of performance information, although they all expected it to take place. Often there was no budget made available within grants to monitor and evaluate effectiveness.

### **11.1.2. Investment in Infrastructure**

Almost all participants felt that in order to develop and maintain appropriate performance/ management information systems, there needed to be an investment in the infrastructure of the organisation. This included external investment such as capital funding for IT equipment, as well as staff training and development time. In addition, there was a belief that organisations would be obliged to invest in this area, providing time for staff to develop systems, learn to use them, and to maintain them.

### **11.1.3. Funding Performance Information Management**

A number of organisations commented that dedicated funding for the development and support of performance/ management information systems was not freely available, and that even funding for monitoring and evaluation time and resources seemed scarce. It was felt that funders often expected organisations to provide a professional level of monitoring and reporting without agreeing to fund the related activities, systems and staff time needed to produce it. One organisation reported that having developed a brief for an upgraded system and sourced a contractor to deliver the work, they struggled to access funding to meet the costs.

## **12. Conclusions and Recommendations**

### **12.1. Overall Conclusions**

Overall, the organisations who took part in the investigation were mainly those who had already engaged, to some extent, in the process of performance information management. As the sample self selected (i.e. chose to respond) it represents those who are already undertaking this work, or see the relevance of it for their organisation. As such, there is possibly a need to reach out to those groups who are not yet at this point to encourage engagement with the issue, and to offer support and guidance to start the process.

The main conclusion to be drawn from the findings is that all of the organisations surveyed are measuring their performance in some way, through the collection, collation, interpretation and reporting of performance information. However, the ways in which they do that, the information they collect and the systems they use vary significantly between organisations.

From the results of the questionnaire, focus groups and interviews, we would conclude that there is no single picture of performance information management and systems in the voluntary adult learning sector. The stage of development of an organisation's system, both in terms of strategic thinking, and technical sophistication, seems to be reliant on a number of situational factors, rather than defined by one specific driver, barrier or need.

The investigation results were unable to determine any direct link between an organisation's sophistication in this area, and their size (turnover or staff numbers etc.) or complexity (number of projects, multiple locations etc.).

Because of the differences between organisations, support and development would need to be tailored to individual situations and capabilities, starting from where they are, and progressing towards a situation where higher-level integration could take place.

However, there seem to be a number of specific areas where organisations would benefit from support and development, which could allow providers to develop and use improved performance information systems. These are outlined below.

### **12.2. Collection of Performance Information**

Organisations working with specific groups of learners requested assistance in the form of good practice guides, or sharing of techniques or suggestions to undertake evaluations and follow-up with their learners, to feed into their performance information. Since this information is often qualitative rather than quantitative in form, there were also calls for guidance on managing qualitative information in a systematic way.

### **12.3. Storage, Organisation and Collation of Performance Information**

For many organisations, a lack of resources to purchase IT equipment and software, and the need for affordable staff training to use new systems, are significant barriers to developing more technically sophisticated systems.

Given the variation in experience of organisations purchasing the development, delivery and installation of performance information systems from external consultants, we would suggest support for organisations looking to take this step. Alternatively, it may be that a list of recommended contractors with a good track record for delivery of MI systems to the sector could be made available.

### **12.4. Interpretation and Evaluation of Performance Information**

Since analysing data, and the transfer of performance information into future planning were raised as key areas for improvement by a number of organisations, it would seem that even where they are collecting, collating and reporting performance information to others, organisations often struggle to find the time or techniques to interpret the information, and make use of it within the organisation. Guidance on the “review” stage of an organisation’s work may be beneficial to some organisations.

### **12.5. Reporting and Promoting Performance Information**

If statistics on performance in CLD were to be collected nationally, consideration would need to be given to the information which organisations would be required to collect and submit, and the mechanism for carrying out that task. Since organisations already report to multiple funders, it would be helpful if any proposed framework could fit closely with other priorities in order to reduce duplication. Alternatively, if a single framework is developed, then perhaps funders could be persuaded to dovetail their reporting requirements with it (where possible).

### **12.6. Understanding and Developing Performance Information Systems**

Many organisations stated that their performance indicators were often driven by funders’ reporting requirements, and that additional goals that the organisation may have developed were often more qualitative and difficult to measure and document progress against. Support in developing achievable and measurable performance indicators may be of benefit to some organisations.

### **12.7. Supporting Performance Information Management**

Since the work of specific individuals within organisations was often shown to be driving the development of new performance information systems, it may be that organisations would benefit from dedicated support for workers undertaking study or investigation in these areas.

### **12.8. Resourcing Performance Information Management**

Support may be required to assist organisations to see the benefits of developing upgraded performance information systems in terms of streamlining their systems and using the information to their advantage. There may also be a support/ development role to play in helping organisations to minimise the impact of these changes on their staff, and how to manage any issues which arise.

In addition, organisations often felt that funders did not recognise the resources (both time and money) which went into providing accurate performance information to fit specific requirements, so an analysis of the resources required (on a full cost recovery basis) to provide this information may be beneficial.

## 13. Case Studies

### 13.1. WEA Scotland

#### WEA

WEA Scotland is a national organisation providing and promoting adult education with particular emphasis on extending opportunities for learning to excluded groups. They have community-based and work-place based adult education programmes covering a variety of areas. Programmes are organised from seven resources bases throughout Scotland, and delivered in over 200 localities.

WEA Scotland are developing a new system to manage their performance information, and provide them with detailed information on the quantitative impact of their work. Much of the groundwork for this was carried out by a member of staff undertaking independent study in this field. This research consulted staff on what information they required in order to evaluate their own work, as well as providing evidence to funders and other stakeholders.

In developing this system they have worked closely with WEA Northern Ireland, who had already developed an effective system. Staff visited the organisation, and this enabled them to see the system in action, and understand fully the benefits and limitations of the system. Due to extensive similarities between the two organisations, WEA Scotland is able to commission an adapted version of the system, reducing costs and development time.

However, in deciding to develop a sophisticated IT-based system, the organisation had to take into account a number of key factors. They are aware that the maintenance of the system will require an ongoing investment in IT infrastructure, and staff training. They are also conscious of the additional requirements that collecting and inputting information onto the system will bring for their staff, and the logistics of making the system accessible to staff working in outreach areas.

They believe that the development of such a system is crucial in helping the organisation to measure its performance, and demonstrate its ability to manage and provide complex information to stakeholders.

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## 13.2. One World Centre Dundee

### **One World Centre Dundee**

One World Centre Dundee is a Development Education Centre, which aims to raise awareness of global issues and the links between our own lives and those of people overseas. It is part of a network of agencies working for global and environmental justice. They are based in Dundee.

One World Centre Dundee currently has three part-time staff, two of whom have just recently come into post. The organisation works with two distinct client groups; schools and community groups.

While information on the performance of the organisation (e.g. inputs, process etc.) is collected, this is usually undertaken by the two development workers individually, and is not collated at organisational level. The organisation produces information to report to funders, but would like to have easy access to more sophisticated information on their work, for both internal and external audiences.

The organisation's recently recruited administrative officer has a strong IT background, and has worked with complex information management systems in her previous jobs. She would like to develop a system which is sophisticated enough to process all the information they store for both client groups, but which can be easily used by the development workers, who have less developed IT skills.

The team are working collaboratively to consider what information they currently collect and store, as well as develop performance indicators to measure progress against. This will form the basis of a brief for the development of a MIS, which will run on Microsoft Access and will be developed in-house by the administrative officer.

The staff feel that they would benefit from IT training at both beginner and advanced level, as well as support and/ or guidance on developing their thinking on managing performance information. They would welcome examples of good practice, or the opportunity to meet with similar organisations who have developed useful systems.

### 13.3. CraigOwl Communities

#### **CraigOwl Communities**

CraigOwl Communities provide learning opportunities for adults who are unemployed, homeless, have chaotic lifestyles, lone parents and substance abuse issues. They are based in Dundee.

CraigOwl have a dedicated database which collects and collates all their learner and performance information across their various projects. The database was built in-house by a member of staff who has IT qualifications and experience, and works as an IT tutor.

In developing this database CraigOwl Communities started from the perspective of what information they were required to present to their funders, then worked back to discover what that required them to collect, and how the information could best be managed.

While they continue to use paper-based forms with their learners, this information is entered onto the database on an ongoing basis, and dedicated reports for each funder, for the whole organisation, or sub-divided by learner groups or class can be easily accessed. This means that reporting to funders, management and their board is straightforward and streamlined.

In addition, through their Help IT project, CraigOwl Communities are able to offer help and support for voluntary organisations in Dundee and Tayside in developing ICT strategies and policies and providing training and support.

#### **13.4. Midlothian Sure Start**

##### **Midlothian Sure Start**

Midlothian Sure Start run six family support centres across Midlothian offering support and guidance to families with children who are predominantly under the age of three.

In order to meet their board's request to address quality assurance within the organisation, Midlothian Sure Start have decided to use the Big Picture as a quality improvement framework and have established a quality sub-group with staff, learner and funder (local authority) participants. The group have been primarily concerned with redefining outcomes as part of the Service Level Agreement (within the context of matching outcomes for the national Sure Start Strategy) with the local authority, but also consider the wider issues of quality of service provision, and assessing impact.

Outcomes for the organisation will be set to be acceptable to both the organisation's core aims, and the requirements of the funder.

They hope to see the work of this group form the basis of any developments in their management of performance information in the future. At present, they have limited resource to devote to developing more sophisticated systems, but they recognise the way in which involvement in the measurement of the organisation's performance, and ownership of the processes involved, can contribute to the learning and development of the organisation as a whole, as well as the individual staff and learners involved.

In addition, each centre elects a service user group to discuss learner issues, and feed these back directly to the board. This is a key technique for accessing service users' assessments of the impact the organisation has had on their lives. It also raises issues for the organisation to consider regarding improvements which could be made to their provision, and highlight any areas of outstanding practice.

## 13.5. Right Track

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### Right Track

Right Track deliver pre-vocational & vocational training to 13-64 year olds. They are based in Glasgow.

Right Track have developed over time an organisational system that includes sophisticated performance/ management information, and have been working with their current database for around 10 years. It was purchased from an external consultant, along with ongoing support. The system, called DKAL, is specifically aimed at organisations providing training and support services for learners, and links in with government initiatives such as Training for Work and New Deal.

The system is managed off-site, and can be updated or adapted when the organisation requires additional information or categories. Ongoing support is available through the provider, making the system responsive and cost effective when new projects or funder requirements are introduced. It tracks all inputs, processes and outputs for learners, and enables the organisation to produce up-to-date statistical information quickly and easily.

When the system was first introduced, it was run independently by each of the individual training centres. However, last year the system was upgraded to work across the whole organisation on a networked system.

The database is accessed as read-only by staff unless they are authorised to enter updated information, to ensure the integrity of the information held. Reports can be produced by managers to monitor their performance, or to send to funders. The reports are also used strategically by the management team and board to make decisions about future provision. They have recently used this to adapt course lengths where evaluation showed that the previous course was not being provided in the most convenient format for learners.

In recognition of the need for staff training and support to use the system, Right Track have identified a particular member of staff with extensive knowledge of the system to train new recruits, produce a handbook on using the system, and be available to solve any issues which arise.

In addition to this statistical system, the organisation have developed an 'outcomes' database which tracks more qualitative information on learner progress and the work of the organisation. This ensures that they are aware of the ongoing picture of progress outwith the structures of qualifications and awards. This is particularly useful where they are required to use funders' external systems to report on outputs only.

The Training Manager conducts routine audits of the training centres to ensure the integrity of the system and the information contained within it. She also conducts dedicated audits following employee turnover or movement within the organisation.

**14. Annex A - Questionnaire**

**Section A - BASELINE:** the general information collected by your organisation  
(e.g. learner names, age, addresses, ethnic group etc.)

1. Does your organisation **gather and record** any of the following **baseline** information regarding your learners  
(e.g. at initial assessments, on booking forms etc.)

	Yes	No	How do you do this?
Learner names			
Age			
Sex/ gender			
Barriers to learning			
Address/ location			
Work status			
Income level			
Ethnic group			
Disability			
Joining date			
Leaving date			
Attendance rate			
Qualification/ prior learning			
Childcare requirements			
Other (please specify)			

2. Does your organisation **store and organise baseline** information regarding learners? Yes

If yes, what baseline information is stored and organised?

How/ where?

e.g. learner attendance	e.g. in individual learner files

**SECTION B - INPUTS:** the resources you use to deliver a programme, project or policy  
(e.g. staff time, equipment, learning materials, buildings etc.)

1. Does your organisation **keep a record** of any of the following information regarding **inputs**?:

	Yes	No	How do you do this?
Funding			
Staff time			
Equipment			
Buildings/ premises			
Learning materials			
Volunteer time			
In-kind support			
Crèche/ childcare facilities			
Catering			
External trainers/ facilitators			
Other (please specify)			

2. Does your organisation **store and organise** information regarding **inputs**?

**If yes**, what information is stored and organised regarding inputs? How/ where?

e.g. total costs for each training session	e.g. training session folder

**SECTION C - PROCESS:** the methods and approaches you take to achieve a desired impact - how you deliver (e.g. training provided, events delivered, research undertaken, one to one support, guidance provided, & discussion)

1. Does your organisation **keep a record** of the **process** you take when working with learners?

**If yes**, can you give some examples of what you keep a record of regarding process?

e.g. workshop outlines with details of each task


2. Does your organisation **store and organise** information regarding **process**?

**If yes**, how is this information stored and organised?

e.g. in workshop file


**SECTION D - OUTPUTS:** the specific products and activities you deliver (e.g. leaflets/ fliers, events, research reports, learning plans, number of attendees, information packs)

1. Does your organisation **keep a record** of information regarding **outputs**?

**If yes**, can you give some examples of what you keep a record of regarding outputs?

e.g. attendee lists


2. Does your organisation **store and organise** information regarding **outputs**?

If yes, how is this information stored and organised?

e.g. record of all attendees held in Excel spreadsheet

**SECTION E - OUTCOMES:** the impacts and changes that result from what you do  
(e.g. increased learner confidence, improved skills and knowledge, increased engagement in learning, t  
learners recognise achievement, improved employability)

1. Do you **set** desired **outcomes** to assess the impact of your work?
2. Does your organisation **record** measures and indicators of **outcomes**? Yes
3. Does your organisation **store and organise** measures and indicators of **outcomes**?

If yes, how is this information stored and organised?

e.g. outcomes listed with measures and indicators in table

**SECTION F - EVALUATION:** how you interpret information to draw conclusions

(e.g. annual learner statistics presented to management committee as a written report, achievement of t analysis of attendance records by project manager etc.)

1. As an organisation, do you use this information (on baseline, inputs, process, outputs and outcomes) to **eval**

**If yes**, how do you do this?

e.g. quarterly review meetings with development staff

2. How do you use this **evaluation** for internal and external purposes? Who does it go to and how is it commur

e.g. statistics on learner achievements used to inform future provision - presented to management committee a

3. Does your organisation **track** learners beyond their time with you?

**If yes**, what do you track and for how long?

e.g. progression into further learning opportunities over 1 year period

SECTION G - YOUR ORGANISATION

1. How would you rate your organisation's capacity to **manage** all the information discussed here?

- |           |      |      |      |           |
|-----------|------|------|------|-----------|
| 1         | 2    | 3    | 4    | 5         |
| very poor | poor | fair | good | very good |

2. What **key areas** would you prioritise for improvement?


3. Are there any other **comments** or input you would like to give at this point?


**Thank you for completing this questionnaire.**



## 15. Annex B

Organisations who took part in the research:

Ace Cornton  
Adult Learning Association  
Annandale & Eskdale CVS  
Anonymous  
Children Inc  
Cothrom Ltd.  
Craigmillar Books for Babies  
CraigOwl Communities  
Edinburgh University Settlement Microbeacon Learning Centre  
Falkirk Women's Technology Centre  
First Step Community Project  
Glasgow ESOL Forum  
Glasgow Simon Community – BUDS Project  
Glasgow YWCA  
Gorgie City Farm  
Independent Advocacy Perth & Kinross  
Lead Scotland  
Learning Link Scotland  
Linknet Mentoring  
Local Area Coordination Service East Renfrewshire (Enable)  
May-Tag Ltd.  
Mearns Healthy Living Network  
Midlothian Sure Start  
Momentum  
Montgomery Development Education Centre  
Motherwell & Wishaw CAB  
Nisus Scotland  
North West Carers Centre  
One World Centre Dundee  
Pathways  
Pilmeny Development Project  
Right Track  
SAMH Redhall Walled Garden  
Scottish Pre-Retirement Council  
SCVO  
Second Chance Learning Greenock  
Sikh Sanjog  
Sorted  
SWAP West  
VETAID  
Vocational Training  
WEA  
Whale Arts Agency  
Women Onto Work



**Learning Link Scotland  
Suite 6  
2 Commercial Street  
Edinburgh  
EH6 6JA**

**0131 553 7792  
[www.learninglinkscotland.org.uk](http://www.learninglinkscotland.org.uk)**