

## Education and Training

### **Evaluation of Individual Learning Accounts Scotland (ILA Scotland) – Learning Providers and Intermediary Agencies Studies**

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The results reported here are key findings from an evaluation of Individual Learning Accounts Scotland (ILA Scotland) commissioned by the then Scottish Executive's Enterprise, Transport and Lifelong Learning Department (ETLLD), and carried out by the Centre for Research in Lifelong Learning (CRL) based at Glasgow Caledonian University between October 2005 and October 2007. The research examined the views of both learning providers and intermediary agencies associated with the ILA Scotland scheme. Interim findings from the study have been published in earlier Research Findings (Learning providers - Research Findings No. 54/2007 and Intermediaries - Research Findings No. 52/2007). This final paper draws together findings from both the Learning Provider Study and the Intermediary Agencies Study, including an initial analysis of the impact of the recent changes made in relation to the operation of the ILA Scotland scheme.

### **MAIN FINDINGS**

- The ILA Scotland scheme has been generally welcomed by both learning providers and intermediaries. It is seen as a valuable additional form of support, particularly for those on low incomes, with limited skills or who are unemployed. The scheme is not, however, seen as a stand alone initiative.
- Many people need encouragement to take steps into learning, and develop what have been described as 'learning attitudes'. This points to the importance of partnerships with other agencies in developing the potential of the ILA Scotland scheme.
- There is also a need to ensure that the scheme fully addresses the needs of learners with disabilities, mental health needs or learning difficulties, and economic migrants for whom English is a second language.
- The issue of extending provision to 16-18 year olds for whom this could be a valuable form of support in assisting them with re-engaging with learning was also raised by several respondents.
- The information provided by ILA Scotland to learning providers and intermediaries was generally described as informative and useful. Respondents commented favourably on the material available through a range of sources, including the website, leaflets and posters.
- Levels of knowledge and understanding of the ILA scheme among staff within learning providers and intermediaries was patchy. While staff who worked most closely with ILA Scotland often had good levels of knowledge, as was typical in the Trade Union sector, this was not true more generally.
- Staff suggested that TV advertising seemed to have relatively little impact, and that word of mouth was a key means through which many learners and potential learners received information about the scheme. The development of locally based advertising and marketing strategies was suggested as a means of raising awareness amongst client groups.

- Respondents in both Phase One and Phase Two of the study also suggested that the advertising of the scheme did not provide enough explicit detail about learning opportunities available, with too much emphasis being placed on funding and not enough on the range of learning opportunities.
- The process of registering as a learning provider was generally viewed as a straightforward experience for most learning providers, and the rigour of the registration process regarded as appropriate.
- The processes for establishing courses as eligible for ILA funding through using the Provider Opportunity Management Tool (PROMT) developed by ILA Scotland were viewed as onerous by many respondents in Phase One, but were more generally accepted by respondents in Phase Two.
- The application process for learners has been noted by a number of respondents as being bureaucratic and creating barriers to participation for certain groups of learners, including those with literacy or numeracy problems, older people, those with disabilities and those from lower socio-economic backgrounds.
- In both phases of the research both learning providers and intermediaries identified the telephone call that the learner is obliged to make to request an application form as a potential barrier. This relates to issues surrounding the confidence and communication skills of the learner. ILA Scotland are currently involved in providing flexible alternatives to this, including piloting an on-line application tool and permitting intermediaries to phone on behalf of a potential learner.
- Learning providers and intermediaries in both phases of this research described income assessment procedures associated with qualifying for the ILA200 as often time consuming, cumbersome and complicated.
- Intermediary representatives were generally critical regarding the learning token system describing it as confusing, both for themselves and for client groups. In particular, participants describe the terminology as confusing and that the term 'token' generates expectations of a plastic coin or card similar to a bank card as opposed to paper documentation.
- A number of respondents from both learning providers and intermediaries welcomed the £10 contribution which learners are required to make, believing the contribution encourages learners to make a commitment to learning. However, other intermediaries in both Phase One and Phase Two view the contribution level as too high, especially for the unemployed and other learners on very low incomes.
- A mixed picture emerged amongst learning providers and intermediary regarding awareness of the recent changes to the ILA100 and ILA200 offers. Some participants indicated that they were not aware of the recent changes to the scheme at all. For those that were aware of the changes, more were knowledgeable of changes made to the ILA100 offer than ILA200.
- Across the different types of both learning providers and intermediaries, no consistent pattern of awareness of the changes was identified amongst these representatives. Within organisations, levels of awareness also varied.
- Most respondents reported that knowledge of changes among learners and potential learners was very limited until they were informed by learning providers or intermediaries.
- The impact of the recent changes on widening the learning opportunities available to potential learners and introducing new learners to adult education was generally welcomed by respondents. The changes were noted as having an impact on increasing the range of opportunities available, widening participation, and providing new opportunities for progression.
- However, while some learning providers welcomed the broadening of the range of courses on offer under ILA100, other providers thought that the extension did not go far enough and would ideally like to see the same courses available under both the ILA100 and ILA200 offers.
- The fieldwork for Phase Two of the study of learning providers was under way before the announcement by ILA Scotland that the £15,000 threshold would be increasing to £18,000 in June of this year. From the limited number of interviewees that referred to the threshold increasing to £18,000, the general consensus was that it was a positive move which would result in more learners being attracted onto the scheme and have a positive impact on widening participation.

## Background

The importance of measures designed to increase and widen participation in lifelong learning, improve skills and enhance the employability of the Scottish workforce have been recognised as important priorities in the policy agenda in Scotland in recent years. (*Life Through Learning Through Life: The Lifelong Learning Strategy for Scotland*, Scottish Executive, 2003; *Skills for Scotland: A Lifelong Skills Strategy*, Scottish Government, 2007). The ILA Scotland scheme is viewed as central to these strategies as a means of encouraging non-traditional learners to access learning opportunities. The first phase, ILA200 (previously named targeted offer), was launched in December 2004 and was aimed at those on low incomes (at the time of the launch, those learners with an income of £15,000 or less and those on benefits were eligible). It provides eligible learners with funding of £200 which can be put towards a wide range of learning opportunities. In June 2007 the income threshold to qualify for ILA200 was raised to £18,000. The second phase, the ILA100 offer (previously named universal offer) was launched in August 2005. This offer is not income restricted. Initially ILA100 eligible learners could access £100 funding towards basic ICT learning leading to a formal qualification/ certification up to SCQF Level 5 or equivalent. ILA100 was extended in summer 2006 to include a much wider range of courses, not just limited to courses in ICT, and leading to a formal qualification/ certification up to SCQF Level 6.

## About the Study

This study set out to evaluate the operation of ILA Scotland from the perspective of learning providers currently delivering the scheme and intermediary agencies who provide information, advice and guidance to learners and potential learners. The impact of the ILA Scotland scheme was considered against the following objectives:

- Widening participation in adult learning by increasing interest and uptake;
- Introducing new learners to adult learning and providing opportunities for those who have not recently participated in learning to do so;
- Encouraging more learning progression;
- Encouraging individuals to invest in their own learning (and take ownership);
- Prioritising the learning needs of certain groups of learners;

- Supporting the development of a quality learning provider base in Scotland.

## Methodology

The study was based on a qualitative methodology involving interviews and focus groups. In the learning providers strand of the evaluation interviews (both face-to-face but predominately via telephone) were conducted with learning providers across a range of sectors, including those from private providers, higher education, Scotland's Colleges, community/voluntary organisations and local authorities. Focus groups and telephone interviews formed the basis of the fieldwork in the intermediary strand of the study. Formal intermediary representatives from careers and learning services, local authorities, employers, voluntary organisations and trade unions took part in focus group discussions or participated in telephone interviews. Informal intermediaries were also approached and the majority of interviews were carried out with them via telephone.

The total numbers of learning providers and intermediary agencies interviewed in both phases of the research are detailed as follows:

- In the Learning Providers Study, **82** interviews were conducted in total. 26 with key representatives from Scotland's Colleges, 26 from the private sector, 10 from local authority, 10 from higher education institutions, 8 from the community/voluntary sector and 2 from sectors which did not fall into any of the other categories.
- In the Intermediary Study, **46** individuals representing formal organisations participated, either through being part of a focus group or interviewed via telephone. Of those who participated, 12 were from the local authority sector, 10 from the voluntary sector, 10 from the trade union sector, 8 individuals who had attended 'Learning Uncovered' events (learndirect scotland's seminars on learning opportunities), 5 from careers and learning and one from a sector which did not fall into any of the other categories.
- In addition **8** informal intermediaries participated in this part of the study. Two representatives came from community education and one each from the retail sector, a library, an adult resource centre, a community centre, a family support organisation and one face-to-face interview was carried out with a learning ambassador (a learner who encourages other learners).

# KEY FINDINGS OF THE RESEARCH

## Perceptions of the ILA Scotland Scheme

Both learning providers and intermediary organisations agreed that the scheme was a valuable addition to other forms of provision which address the issues of supporting part-time learners, widening access to education and training, and promoting more flexible learning opportunities. They also viewed the scheme as a useful source of encouragement, and financial assistance for learners' initial re-entry to learning. The issue of building confidence was also mentioned by both learning providers and intermediaries, as being of importance in encouraging people to engage in new learning experiences which can improve their skills and employability. In particular, intermediary agencies emphasised the ways in which the scheme is of value to a range of people in marginal and vulnerable positions, who need support in moving forward in their lives.

It was also noted that the scheme has opened up a choice of learning providers, and is not just restricted to providers based in formal educational settings.

Whilst respondents recognised the strengths of the ILA Scotland scheme, it is suggested that it is best seen as one which complements other initiatives. A number of respondents suggested that it is an interest in undertaking a course which is the initial impetus for learners to take up opportunities, rather than the potential for financial support. The ILA Scotland scheme was described as supporting processes of re-engaging with learning most effectively by strengthening links with a wide range of different learning providers, many of whom may be community-based.

While the value of ILAs in supporting learning is recognised, respondents also suggested that certain groups may face difficulties in accessing learning opportunities through the scheme. This includes those with disabilities or mental health difficulties, who may experience confidence issues in both making contact with ILA Scotland and completing the application form, unless they receive a considerable measure of support.

It was also suggested that there is a gap in provision for those school leavers aged between 16 and 18. This group represents a considerable body of learners who may be able to benefit from ILA funding, and try learning in a different environment in order to gain a vocational qualification to improve employability. Growing interest from people for whom English is a second language was also identified as an issue for the ILA Scotland scheme. While ILA Scotland

publicity leaflets and application packs are available in a wide range of Asian and European languages, it was suggested by some respondents that more could be done to improve provision particularly for the growing numbers of economic migrants in Scotland.

## Information, marketing, and awareness of the ILA Scotland scheme

Information for learning providers and intermediaries from ILA Scotland was described in both phases of the research as being informative and useful in understanding the scheme and responding to the needs and queries of learners. Respondents also commented positively on the support provided by ILA Scotland staff.

In both phases of the research, the level of understanding and awareness of the ILA Scotland scheme amongst intermediary and partner agencies was described as mixed, though this was dependent on how actively involved individuals were with the scheme.

Overall, research from both phases found that information from ILA Scotland for learners and potential learners was good, clear and informative. However, both learning providers and intermediaries expressed the view that awareness of the ILA Scotland scheme amongst client groups was mixed, and often limited. In particular, agencies working with learners with disabilities, mental health problems or substance misuse problems commented on the low levels of awareness amongst those client groups.

It was suggested by representatives from both learning providers and intermediary agencies that existing marketing approaches are likely to be most successful with those individuals who were already interested in learning. While it was recognised that national TV advertising had helped to raise the profile of ILAs, a range of respondents raised doubts about the effectiveness of this form of advertising in reaching the key target groups and actually recruiting learners onto programmes.

It was suggested that more could be made of the expertise of ILA staff and the valuable range of marketing materials if more locally based advertising and marketing strategies were developed.

In developing a more locally based scheme it was noted by many respondents that learning providers and intermediaries already play an important role in providing information and encouraging participation in the ILA scheme. Intermediaries describe engaging in a wide range of awareness-raising activities regarding the ILA Scotland scheme amongst client groups.

Respondents suggested that if the links which they had with ILA Scotland staff in disseminating information about the ILA scheme could be strengthened this could be an important means through which key target groups could be reached. The relationship which has been established between ILA Scotland and Trade Unions was noted as an example of good practice which could possibly be used as a model in developing links with other agencies.

## **Procedures associated with the ILA Scotland scheme**

The processes of registering as a learning provider varied across sectors, but on the whole it was viewed as a positive and straightforward experience for most providers.

There were very mixed responses from learning providers to the Provider Opportunity Management Tool (PROMT) in the course registration process. However, it became clear during Phase Two of the research that providers believed they had developed greater competency in the use of the tool.

An important change which has been widely welcomed by providers has been the introduction of flexible start dates (in May 2006). This enables learning providers to enter courses which do not have a designated start or end date in the PROMT tool without the need for the monthly updates which were previously required.

The application process has been noted by a number of respondents as being bureaucratic and creating barriers to participation for learners with literacy or numeracy problems, older people, learners with disabilities and those from lower socio-economic backgrounds. Intermediary agencies in particular described the process as time-consuming, and noted that this was one of the least successful aspects of the scheme. The application form itself was described as cumbersome and difficult to complete. Agencies suggested that it should be made more streamlined and user-friendly. Representatives whose client groups include learners with learning difficulties highlight that the application pack is inaccessible for these learners.

In both phases of the research, learning providers and intermediaries identified the telephone call that the learner is obliged to make as a potential barrier. Intermediaries suggested that they could provide an alternative to the initial telephone call through acting as a channel for the dissemination of application packs. It was highlighted that certain agencies, for example Trade Unions and local authority agencies, are fully accountable bodies and could provide a mechanism through which to supply application packs to members or employees.

Learning providers and intermediaries in both phases of the research described income assessment procedures as time consuming, cumbersome and complicated. This creates barriers which can result in people applying only for ILA100, which does not require proof of income.

Respondents also commented on the additional burdens which are associated with having to update this evidence on an annual basis if entitlement to the ILA200 is to be maintained. This led to the suggestion that rolling information might be a way to minimise the burden associated with this requirement.

A number of learning providers and intermediaries interviewed during Phase One and the earlier part of Phase Two of the research viewed the initial £15,000 income threshold as too low. However respondents in the later stages of Phase Two, who were aware of the raising of the income threshold to £18,000 in June 2007, welcomed this development.

The learning token is the means through which learners pay providers for their course with their ILA funding. Among learning providers in both Phase One and Phase Two of the research, views of the learning token system were mixed, with some providers regarding it as an accepted part of the administrative process, whilst others found the process cumbersome and problematic. Intermediary representatives were generally critical regarding the learning token system describing it as confusing, both for themselves and for their client groups. In particular, participants described the terminology as confusing, and that the term 'token' generates expectations of a plastic coin or card similar to a bank card, as opposed to paper documentation.

Perceptions of the £10 contribution were very varied among both learning providers and intermediaries. On the one hand, the contribution was described as a way of encouraging learners to invest in their own learning and establish commitment to a course. However, some intermediaries viewed the contribution level as too high, especially for the unemployed and other learners on very low incomes and some providers thought that the contribution presented them with an additional administrative task.

## **Awareness and impact of recent changes to the ILA Scotland scheme**

A mixed picture emerged amongst learning providers and intermediary regarding awareness of the recent changes to the ILA100 and ILA200 offers. Some participants indicated that they were not aware of the recent changes to the scheme at all. For those that were aware of the changes,

more were knowledgeable of changes made to the ILA100 offer than ILA200.

Levels of awareness of the changes amongst learners were described as very low, with the vast majority of providers stating that their perception was that learners' knowledge of these changes was minimal.

The impact of the recent changes on widening the learning opportunities available was generally welcomed by both learning providers and intermediaries.

From the limited number of learning providers who were able to pass comment on changes introduced to ILA200, the removal of the restriction that ICT courses must lead to a formal qualification or recognised certification generated a mixed response.

The change to the ILA100 offer where courses would now be offered up to and including SCQF Level 6 was welcomed by providers across different sectors. Some intermediary agencies also spoke positively about the changes to ILA100. However, some learning providers and intermediaries thought there were still too many restrictions associated with the ILA100 and one way to address this was to make the same courses eligible through both offers.

As noted, from the limited number of learning providers and intermediaries who commented on the original £15,000 income threshold increasing to £18,000, the general consensus was that it was a positive move which would result in more learners being attracted onto the scheme and would have a positive impact on widening participation.

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The report, "Evaluation of Individual Learning Accounts Scotland (ILA Scotland) – Learning Providers and Intermediary Agencies Studies", which is summarised in this research findings is a web only document and is available on the publications pages of the Scottish Government website at

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