



Department  
for Business  
Innovation & Skills

**COMMUNITY LEARNING TRUST  
PILOT EVALUATION REPORT –  
SET UP STAGE**

MARCH 2013

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The views expressed in this report are the authors' and do not necessarily reflect those of the Department for Business, Innovation and Skills.

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# 1. Introduction and methodology

## 1.1 Preface

This report is a thematic review on the setting up of the Community Learning Trusts pilots (CLTs) from the scoping visit and first round of visits in November and December. There are references to individual CLTs and a selection of short case studies but these are summaries of activity rather than detailed accounts. The final evaluation report will include more detailed case studies and recommendations.

## 1.2 Introduction

The Department for Business, Innovation and Skills has commissioned TNS BMRB, RCU and The Campaign for Learning to conduct an evaluation of the Community Learning Trust (CLT) pilots. This report provides 'early stage' evidence of CLT progress, drawing on information collected between September and December 2012.<sup>1</sup> It provides a broad overview of the establishment of the CLT pilots and the different delivery models. It looks at impacts experienced as a result of the areas being chosen to participate as CLT pilot areas and provides a broad overview of CLT set up and implementation, including key challenges reported. Case studies are included to identify benefits and lessons being learnt in regard to partnership working, the engagement of communities and in the development of a 'Pound Plus' strategy. Finally, this report concludes with an outline of the next steps for the evaluation. The final report of the evaluation will be published in summer 2013.

## 1.3 Context

Community learning describes a broad range of learning, usually unaccredited, for adults aged 19 and over to *"pursue an interest, address a need, acquire a new skill, become healthier or learn how to support their children better."* Learning topics can range from arts, culture and health to family learning and community development.

There is no 'one size fits all' model for the delivery of community learning. Currently the government invests £210 million per annum to support the delivery of community learning and is committed to the continuation of this allocation for 2013/14.<sup>2</sup> To test innovative planning and delivery approaches, fifteen CLT pilots have been selected (see box one for the list of areas). The pilots are aimed at enabling local people, organisations and providers to work collaboratively to develop community learning priorities, strategies and partnership models relevant to their own communities. The CLT pilots received no additional funding to take part in the 12 month pilot.

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<sup>1</sup> It is noted that the areas will have moved on in their development since the first round visit.

<sup>2</sup> Department for Business Innovation and Skills (December 2012) *Skills Funding Statement 2012-2015*, London: BIS. Available: <http://www.bis.gov.uk/assets/BISCore/further-education-skills/docs/S/12-p172-skills-funding-statement-2012-2015.pdf>

In the 2013/14 funding year, all directly funded providers will be required to deliver a truly locally-determined learning offer, as piloted by the fifteen areas.<sup>3</sup>

### Box one: The fifteen CLT Pilot areas

The fifteen areas were selected on the basis of their proposed models, priorities and themes to lead the way in developing and testing new approaches to local delivery of community learning. The areas are:

Bedfordshire	Kent
Birmingham	Luton
Blackburn with Darwen	Sheffield
Brighton and Hove	Solihull
Cheshire	Sunderland
Cumbria	Bristol
Derby	West Sussex
Exeter	

## 1.4 The evaluation: Aims and objectives

The evaluation of the Community Learning Trust Pilot Programme is running over a year, until July 2013. It will explore the relative success of the CLT pilots' different approaches in delivering against the criteria set out in *the Community Learning Prospectus* published April 2012.<sup>4</sup> The criteria are based on the new community learning aims and objectives (see box two below).

### 1.4.1 Research aims

The evaluation is focussing on:

- Understanding the process and nature of practices employed within trusts to achieve community learning aims and objectives. These will be explored through the life of the evaluation and draw out innovative ideas, effective practice and key lessons learned in relation to how CLT pilots:
  - Bring together learners from different backgrounds
  - Target learners from disadvantaged groups
  - Utilise local partnerships

<sup>3</sup> Department for Business Innovation and Skills (December 2012) *Skills Funding Statement 2012-2015*, London: BIS. Available <http://www.bis.gov.uk/assets/BISCore/further-education-skills/docs/S/12-p172-skills-funding-statement-2012-2015.pdf> page 13

<sup>4</sup> Department for Business Innovation and Skills (April 2012) *Community Learning Trust Pilots: Prospectus*, London: BIS. Available: [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/32291/12-625-community-learning-trust-pilots-prospectus.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/32291/12-625-community-learning-trust-pilots-prospectus.pdf)

- Devolve planning and accountability and involve local people
  - Minimise overheads, bureaucracy and administration
  - Monitor their own effectiveness in meeting their aims and objectives.
- 
- Understanding the ways in which each CLT pilot area is able to demonstrate maximising the value of public investment. This is referred to as '**Pound Plus**' and refers to additional income generated *over and above* core income. It includes direct income, cost savings, value for money, fee setting strategies and how income is re-invested in community learning. Each trust has been sent guidance to help them develop their Pound Plus strategy.<sup>5</sup>
  - Understanding (and measuring, where possible) the ways in which each CLT pilot has an impact on learners and the community in relation to:
    - **Learner outcomes** - such as participation, learner progression
    - **Wider social impacts on learner and community** – for instance in relation to health, family/social relationships, confidence, crime, wellbeing, citizenship (e.g. volunteering).
  - Exploring the differences between CLT pilots, and between CLT pilots and control areas (see below for information on the controls) and making recommendations for taking the initiative forward in terms of successful models and practices.

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<sup>5</sup> Available as Appendix A.

## Box two: Community learning objectives<sup>6</sup>

The objectives of government supported learning are to:

- Focus public funding on people who are disadvantaged and least likely to participate, including people in rural areas and those on low incomes with low skills.
- Collect fee income from people who can afford to pay and use where possible to extend provision to those who cannot.
- Widen participation and transform people's destinies by supporting progression relevant to personal circumstances, e.g.
  - improved confidence and willingness to engage in learning
  - acquisition of skills preparing people for training, employment or self-employment
  - improved digital, financial literacy and/or communication skills
  - parents/carers better equipped to support and encourage their children's learning
  - improved/maintained health and/or social well-being.
- Develop stronger communities, with more self-sufficient, connected and proactive citizens, leading to:
  - increased volunteering, civic engagement and social integration
  - reduced costs on welfare, health and anti-social behaviour
  - increased online learning and self-organised learning
  - the lives of our most troubled families being turned around.
- Commission, deliver and support learning in ways that contribute directly to these objectives, including:
  - bringing together people from all backgrounds, cultures and income groups, including people who can/cannot afford to pay
  - using effective local partnerships to bring together key providers and relevant local agencies and services
  - devolving planning and accountability to neighbourhood/parish level, with local people involved in decisions about the learning offer
  - minimising overheads, bureaucracy and administration.
  - involving volunteers and Voluntary and Community Sector groups, shifting long term, 'blocked' classes into learning clubs, growing self-organised learning groups, and encouraging employers to support informal learning in the workplace
  - supporting the wide use of online information and learning resources
  - minimising overheads, bureaucracy and administration.

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<sup>6</sup> Department for Business Innovation and Skills (December 2011) *New Challenges, New Chances Further Education and Skills System Reform Plan: building a world class skills system*, London: BIS.

## 1.5 Research Methodology

The core evaluation methodology consists of qualitative site visits and quantitative data analysis. There are three other work strands which form part of the evaluation and will be reported on separately. These are:

- The Evaluation Expert Group facilitated by The Campaign for Learning. The group is made up of representatives from national organisations with an interest in community learning
- Individualised Learner Records (ILR) and Pound Plus<sup>7</sup> analysis for the Workers' Educational Association (WEA) and Local Education Authority Forum for the Education of Adults (LEAFEA) led by RCU
- A Learner Survey on fee strategy and consultation led by the quantitative team within TNS BMRB.

### 1.5.1 Qualitative site visits

The core methodology involves three site visits to each of the CLT pilots, in addition to an initial scoping stage. A range of qualitative methods are being drawn on as part of the site visits – in-depth interviews, group discussion and workshops - adapting our approach to the needs of different respondent groups. Time is being spent in each area to develop an understanding of the structure and operation of the pilots locally, to ensure a true picture of activity and outcomes.

These visits are aimed at exploring experiences, views and impacts of the pilot for providers, contractors, sub-contractors and the local community, including learners. The visits are structured as:

- A short initial informal 'scoping' visit to lead CLT pilot area contacts (September/October 2012)
- Site visit one to explore set up and implementation (November/December 2012)
- Site visit two to explore initial delivery (February 2013)
- Site visit three to explore on-going delivery and perceived impacts (April/May 2013).

The site visits are not intended to evaluate the impact of community learning in a given locality. They are evaluating the impact of the new CLT pilot model and initiatives as detailed in the application to become a pilot area.

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<sup>7</sup> 'Pound Plus' refers to additional income generated *over and above* core income. It includes direct income, cost savings, value for money, fee setting strategies and how income is re-invested in community learning

## 1.5.2 Quantitative data analysis

Data analysis of ILR data to compare between pilot area activity in 2012/13 and the activity in the same areas in the three years prior to the pilot starting (2009/10 – 2011/12) is being carried out for operational use by BIS, the Agency and the CLT pilots with the aim of understanding distance travelled during the pilot and how this relates to past performance and trends.

The ILR data analysis, for operational purposes, will involve learner volumes, participation rates and retention rates by:

- Geographical area (Local Authority ward level) and urban and rural differences
- Indices of Deprivation (IMD 2010) based learner home location
- Learner characteristics (ethnicity, age, learning disability, gender)
- Course category (PCDL – Personal Community Development Learning, WFL - Wider Family Learning, NLDC – Neighbourhood Learning in Deprived Communities, FEML - Family English Maths and Language), subject area and level of study (where appropriate)
- Engagement with new learners or repeat learners
- Contractor/subcontractor delivery and delivery location
- Wider outcomes, as measured by SROI analysis or the NIACE tool, may be carried out by the CLT pilots themselves and the evidence supplied to the evaluation team.

### **Control areas**

In order to consider how effectively different models deliver against the community learning objectives, the evaluation also includes five anonymised 'control' areas that are not currently part of the pilot and do not have Trust status. The control areas will play a valuable role in building the evidence base around community learning and in contributing to the evaluation as a whole.

The control areas were chosen on the basis of being 'statistical neighbours' and on their application status (those applied and shortlisted, those applied and those not applied). Four out of the five areas had applied to become a CLT pilot area.

Control area involvement consists of a 'scoping' telephone call and a 'lighter-touch' day-long site visit in November/December 2012 and in spring 2013.

## 1.6 Summary of evaluation progress

The evaluation is around a third of the way through, with the 'scoping' and first round site visits complete. Data analysis of 2011/12 ILR information has provided a baseline for the CLT pilot areas and this has been supplied to all of the CLTs.

The evaluation team have also produced guidance for the CLT pilot areas to help develop and test a Pound Plus strategy across community learning. This is provided in Appendix A.

## 2. Establishment of the CLT Pilots

### 2.1 Introduction

This section provides a broad overview of the CLT pilot delivery models. Every CLT pilot area is at a different stage in terms of their model and operating structure. Some pilots are building on a model of delivery for community learning that has developed or 'evolved' over many years. In these areas the CLT model is described by the CLT as the next logical step, and likely to have been something the area would have worked towards, or certainly aspired to do so, regardless of their participation in the pilot. Nonetheless, participation in the pilot, and CLT pilot status itself, has certainly had valuable 'galvanising' and 'attracting' impacts in these areas. These impacts are explored further in Section Three below.

A number of the CLT pilot areas are still in the planning stages and, at the point of the first site visit, refining their aims and objectives. Other areas are focussing their first year of development in setting up the structures or infrastructure to enable a greater orientation towards community focussed delivery. In these areas, significantly new areas of delivery are more likely to take place after summer 2013.

Those CLT areas that were still in the early stages of progressing or developing their model expressed reservations about the feasibility of demonstrating impact during the life of the pilot.

### 2.2 Overview of the Pilot CLT delivery models

Each CLT pilot area is very different in terms of their focus and themes but also in the scale of what they are trying to do. For instance, West of England CLT (Bristol) is working on a large scale in collaboration across three local authorities. Luton and Bedfordshire are two separate CLTs working closely together on a 'twinned' basis, with a joint Steering Group. In Exeter, Trust in Learning, is smaller in scale and funding, using a small percentage of the CLT budget and focusing efforts on the City centre only.

Following the first round of site visits, the CLT delivery models can be broadly described as falling into five dominant structures or approaches:

1. **Strategic co-ordination or enabling of activity by local authority (four CLT pilot areas)**
2. **Strong partnership between local authority and community (four CLT pilot areas)**
3. **Cross boundary local authority working (six CLT pilot areas)**
4. **FE College led (two CLT pilot areas)**
5. **Social enterprise led (one CLT pilot area).<sup>8</sup>**

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<sup>8</sup> Adds up to fourteen areas due to twinned approach in Luton and Bedfordshire being counted as one CLT pilot approach.

This early stage division is intended to provide a 'flavour' of CLT delivery models only. There is also a large degree of overlap between and across the different approaches. These approaches could change and develop across the life of the evaluation.

Looking at the control area approaches, three of the areas can be broadly described as 'strategic co-ordination or enabling of activity by local authority,' one control area is 'strong partnership between local authority and community' and one area is 'cross boundary local authority working.'

Table one sets out this early stage division of the pilot trust areas by approach.

**Table one: Broad structures/approaches taken by the CLT areas**

<b>Overall structure/approach</b>	<b>Pilot Trust</b>	<b>Operating model</b>
<b>Strategic co-ordination or enabling of activity by local authority</b>	Birmingham Community Learning Trust	Local authority adult education service working with providers to target three disadvantaged areas of the city to align community learning activity
	Kent Community Learning Trust	Local authority led partnership model focussing on volunteering, social cohesion and the engagement of disadvantaged learners
	Sheffield Community Learning Trust	The local authority acts a strategic sponsor of community learning provision and works closely with its third sector partners to develop local capacity
	Sunderland's Community Learning Trust	Local authority led working in close partnership with the voluntary sector to build and strengthen capacity. All provision is outsourced and managed through an 'open call' process
<i>Three control areas</i>		
<b>Strong partnership between local authority and community</b>	Sustainable Neighbourhood Services (Blackburn with Darwen)	Integration of community learning at a neighbourhood model building on 'Your Call', an existing process of community involvement whereby communities are encouraged to set priorities in Ward Solution Meetings
	Brighton and Hove Community Learning Trust	Equal partnership of six providers led by an independent community adult education organisation and working with other public, voluntary and private sector organisations
	CLCumbria (Cumbria)	Focussed activity on an isolated rural area with the aim of understanding whether engaging communities changes the current community learning offer and the effect on other strands of local work
	Derby Community Learning Trust	An equal partnership between the local authority and voluntary sector to target community learning at the most deprived areas of the city
<i>One control area</i>		

<b>Cross boundary local authority working</b>	Community Learning in Cheshire	Joint working between two borough councils and a network of 44 partners focusing on seven transformation themes designed to address the community learning objectives.
	<i>One control area</i> West of England Community Learning Trust (Bristol)	A partnership of all Agency funded providers across three local authority boundaries spanning urban, rural and seaside communities - Bristol City Council, South Gloucestershire Council and North Somerset Council and FE colleges and WEA
	The Luton Trust working in partnership with Bedfordshire	Twinned model of delivery pooling budgets, led by a single Steering Group to increase focus on those under-represented in learning and save money via the provision of one unified programme of community learning
	Bedfordshire working in partnership with The Luton Trust	Twinned model of delivery pooling budgets, led by a single Steering Group to increase focus on those under-represented in learning and save money via the provision of one unified programme of community learning
<b>FE College led</b>	The Solihull Source (Solihull)	College led CLT focusing on health and wellbeing and enterprise aimed at bringing a wide range of organisations together
	Trust in Learning (Exeter)	College led CLT in partnership with a selection of voluntary sector organisations and Devon County Council with focus on community learning in Exeter City
<b>Social enterprise led</b>	Liberate (West Sussex)	CLT led by an independent social enterprise to provide direct delivery of community learning to local communities, by working with partners to identify needs and gaps

## 3. Community Learning Trusts: General progress

### 3.1 Introduction

This section looks at the impacts experienced as a result of the different areas being chosen to participate as a CLT pilot area. It also references the control areas and their perceptions of the consequences of 'non-participation' as a CLT pilot.

A broad overall review of CLT pilot set-up and implementation is provided, together with a summary of the key challenges reported by interviewees as influencing the speed of their model's set up and establishment. Finally, this section considers positive work in the areas to accelerate their progress and partnership working.

### 3.2 Participation in the pilot

The first round site visits revealed a number of immediate impacts as a result of being chosen to participate in the pilot and as a consequence of becoming a CLT pilot area. Overall, an important positive 'galvanising' impact was evident.

Interviewees highlighted a valuable morale boost due to participation. Becoming a CLT pilot area was perceived as contributing towards a feeling of momentum internally and a drive to change practice and delivery of community learning. Interviewees were proud and excited to be showcasing their model to the wider world of community learning.

***"Being a CLT pilot has built the momentum and has given us the drive" (Cheshire CLT)***

***"The pilot has added a lever; it's given us an added momentum" (Sheffield CLT)***

Interviewees across all of the CLT areas spoke of an increased 'kudos' arising from becoming a CLT and of a positive profile boost for their area of work. For example, in Derby, they highlighted the value of becoming something new – a 'Community Learning Trust' - in generating enthusiasm and interest in their work with key partners, and across the community more widely.

***"The Trust has been good for galvanizing that group (the CLT steering group), taking it forward and expanding it- there are more organisations involved and there's more momentum around it" (Derby CLT)***

Furthermore, a number of the CLT pilot areas have attracted or sought media attention (either local radio or press) as a result of participating in the pilot. For example, a lead contact in Derby has spoken on the radio about the CLT and their planned activities, and in Luton and Bedfordshire the launch and consultation event was attended by local media, including a community radio station already working with excluded young people and interested in delivering a community learning offer of its own.

The site visits revealed a number of common motivations within the areas for choosing to participate in the pilot. These motivations can be grouped into three broad aims:

- Prove the importance and value of community learning
- Shape and influence the future of community learning policy
- Maintain position and credibility at the forefront of community learning practice.

More specifically, the areas were keen to show good practice and share this with other areas (including the non pilot areas), test new and innovative ways of delivery and different activities and learn from others and work with new partners and organisations.

***“It’s a large complex environment, we need to be involved and be at the forefront of the new way of doing things” (Birmingham CLT)***

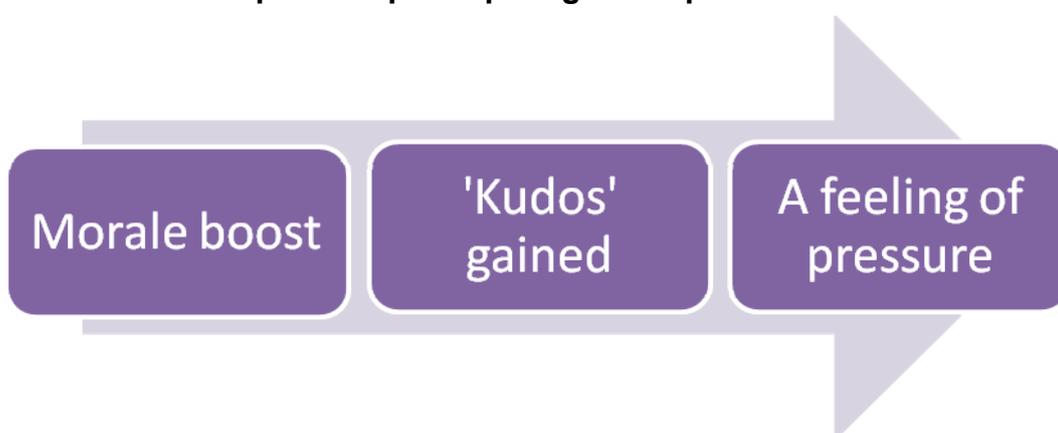
***“We need to trail blaze. I think we’ve got a story to tell” (Liberate, West Sussex)***

***“The pilot enables us to demonstrate the good value for money of community learning and proves to the government that it is worthwhile” (Cheshire CLT)***

One impact however, which can be seen as flowing directly from the motivations to participate above, is a resulting strong sense of pressure.

This pressure is around the perceived need to convincingly prove the worth and impacts of community learning, together with the collection of robust and tangible Pound Plus evidence at the same time as delivering within a very tight timescale. The establishment of CLT models, and the involvement of a wider range of different partners, is time consuming and takes work. This was not necessarily something that areas had realised they would be signing up for when they first put their bid together.

**Figure one: Perceived impacts of participating in the pilot**



### 3.3 'Non-participation' in the pilot

Four out of the five control areas unsuccessfully applied to participate in the CLT pilot. These control areas were asked if they had noted any impacts as a consequence of their 'non-participation.' Firstly, unsurprisingly, the unsuccessful areas were disappointed or felt that they had missed an opportunity to promote their models of delivery for community learning.

***"We needed to be at the forefront of the development of community learning."  
(Control Area Three)***

Two out of the four areas were unclear as to why their applications had been turned down which had contributed to a sense of grievance.

Despite being unsuccessful, three out of the four areas are continuing with the model, or at least a closely aligned version of this, as originally set out in their application. In one control area, they described the application process and plans working towards (as a result of this) as an opportunity to "cement" partnership working and a natural progression of existing work. In one area it was felt that, although it was disappointing to be turned down, progressing the new model of delivery outside of the pilot programme probably resulted in less pressure on those involved as they could develop in their own timescale without outside evaluation.

***"The pilot trust came across at the ideal time for us, a way to cement things together."  
(Control Area Four)***

For some, this progression with their application was in part due to the fact that work had started (and needed to, in order to meet the aims) before the pilot trust decisions were made.

Only one area had decided not to progress with the model of community learning delivery as set out in their application. The process of developing and putting together their application at the outset was described by some interviewees as having been cumbersome. This was due to the involvement of a large number of partners and the lead organisation's aspiration to take into account and balance their respective points of view and priorities. There was some uncertainty about how this way of working would have played out if they had been successful with the bid and if some tensions would have been overcome.

All control areas referred to being eager to learn from the CLT pilot areas' new ways of delivery.

### 3.4 CLT pilot development: Set up and implementation

From August 2012 onwards all of the CLT pilot areas have been immersed in the planning and development stages of their model of delivery. As noted in Section Two above, this has taken longer than some areas had anticipated. Certain areas have a head start due to the fact that they are building on established work. Others are starting from scratch.

Overall it remains early days for most CLT pilot areas in terms of the set up and implementation of their model.

A number of interlinking challenges have affected the speed of progress in CLT development – some of these are beyond the control of individual areas. The table below sets these out.

**Table two: Reported challenges to CLT model set up**

Reported challenges to CLT set up and implementation
<p><b>Impact of wider context:</b> Community learning is a small cog in a wider context of change beyond the control of individuals – for example: critical staff members leaving or being on long term sick leave, spending and budget cuts and reductions, organisational change or restructuring, local political change and national and local policy reform.</p>
<p><b>Building collaboration:</b> Despite the myriad of benefits from partnership working, it can sometimes slow down decision making in that issues need discussion and consensus. Good quality collaboration can be time consuming.</p>
<p><b>Limited capacity and time:</b> Some areas are revisiting the aims and objectives in their applications to work out what is achievable in the timeframe. Across all of the areas capacity is limited. This is a particular challenge to working with voluntary sector partners.</p>
<p><b>Unexpected targets or areas of work:</b> In particular the collection of Pound Plus evidence. For most areas this is a new area to gather evidence on.</p>

Despite the speed of their development, every CLT pilot area is establishing, refreshing or developing partnerships. This is proving to be really fruitful. Furthermore, despite the challenges reported above, most areas had not experienced difficulties at getting partners to the table. A number of 'refreshing,' 'attracting' and 'reflecting' effects are playing out across the different pilot areas:

### 3.4.1 Refreshing

A refreshing, or adding of new vigour, to existing or old networks and partnerships was noted by interviewees as taking place in their areas. The CLT pilot was seen as an opportunity to cohere and strengthen, or build on, existing work. For example:

- In Solihull the CLT pilot was described as a brilliant excuse to go and talk to existing partners and to encourage fresh and new conversations about community learning activities. An already successful partnership between Solihull College and Solihull MBC has been extended to a tripartite partnership with SUSTAiN representing the voluntary and community sector.
- In Sheffield, the CLT is working to align many aspects of their community learning offer with the city's 'Successful Families' initiative which is a response to the Troubled Families agenda. This response is particularly focused on Family Learning, but also includes the offer of other community learning. The CLT is making 'Successful Families' key workers aware of the provision available and how to make use of it. There are plans to link the work of community learning champions in each locality with the work of the key workers to create a seamless approach. This is a good way to use funding from different streams where there is a close overlap in objectives to provide a holistic service.
- In Exeter, the Trust has provided an opportunity to re-establish and re-invigorate relationships between delivery partners. This has supported greater partnership cooperation between providers and enabled the incorporation of a volunteer element to community learning. There has been a shared commitment to reach those identified in the pilot as 'hardest to reach' and 'furthest from employment'. The CLT seeks to confirm the notion of learning being the catalyst for improved mental and physical well being.

### 3.4.2 Attracting

Across the board the CLT pilot areas are working with new partners and with new types of learners and new ways of learning. The CLT status is being used as a 'hook' to attract new partners and learners.

**Case study 1:****Attracting and supporting Voluntary sector groups: Sunderland CLT**

In Sunderland, the local authority's Family Adult and Community Learning Service has been working with a number of different organisations who support people who are substance misusers and/or parents and carers of children who are misusing substances. They have also worked with a number of organisations with an interest in supporting improvements in people's general health and wellbeing. This work combined with desk research has fed into the Sunderland Annual Service Plan to identify obesity and substance misuse as areas of priority and potential areas for the development of future learning provision. As a result, the CLT has identified new groups working in these areas, for instance family support projects and substance misuse self help groups, and they are now working with these organisations to research what would engage their service users in learning and build appropriate learning provision.

As noted in Section Two above, a number of areas have held **launch events** to raise their profile, attract partners and to contribute to and build on a feeling of momentum. In the West of England CLT (Bristol), the launch event attracted a range of different potential partners and media. Delegates were asked to sign a pledge to commit to supporting community learning. In Luton and Bedfordshire, more than 100 people attended a launch and consultation event to hear about the pilot and a Community Learning Fund that new partners could bid to.

**3.4.3 Reflecting**

Interviewees talked about the level of self-reflection and review of delivery that is being carried out as a result of becoming a CLT. This is in terms of reviewing existing offers and areas of community learning activity; thinking about the skills different partners can bring to the table and; going through and reviewing Pound Plus information and strategies to apply a more business minded approach to the way in which markets of learners and the types of learning are identified and provided.

It is important to note that the different CLT pilot areas are at very different stages of reflection and review, with some areas much further down this road than others.

## 4. Community Learning Trust specific progress: Partnership working, engagement and Pound Plus

### 4.1 Introduction

This section looks at Community Learning Trust progress in relation to three of the application themes and includes a number of case studies to identify benefits and lessons being learnt. The three themes are:

- Partnership working
- Engagement of communities and targeting disadvantaged learners
- Establishing a Pound Plus strategy.

### 4.2 Partnership working

Partnership working is a strong and important theme across the evaluation and the cornerstone of effective delivery and progression. Every interviewee talked about their partnership work and that it was yielding results - even in those partnerships that were fresh and new.

Ongoing partnership work within the CLT pilot areas includes the mapping of learner needs and current learning provision; working to avoid duplication in activities and identifying ways to potentially save or generate income. Other areas are working out how to play to each other's strengths to best effect within the new structures. For instance, one area (an equal partnership between the local authority and the voluntary sector) partner talked of deliberately working to these strengths in the way in which they have divided up tasks (see Derby Community Learning Trust below).

All areas noted that 'joined up working' meant that decisions could take longer to be made. The CLT areas needed to navigate different, and at times competing, priorities between organisations and work towards the establishment of a shared 'language' for the CLT model. In some areas the history of relations between different organisations needed to be taken into account and resolved. For example, one area described the FE Colleges as traditionally at 'tooth and claw' with each other. In another, it was noted that it was hoped that partnership working and sharing resources would lead to distributed responsibility and change the historical power structure.

It was acknowledged that this ‘joined up’ working as a cohesive partnership took time to establish and that for those working in newer structures; this would be the main focus of their first year of activities.

The table below simply summarises the main elements that the CLT pilot areas reported as working well, and the challenges they were experiencing in terms of working with different partners. These elements are not new, but they are certainly having an impact on the way in which different structures are developing. Particularly in regard to the speed of CLT model development in the different areas.

**Table three: Reported challenges and opportunities of partnership working**

Working with:	Local Authorities	Community and voluntary sector	Colleges
Challenges	<ul style="list-style-type: none"> <li>• Slow moving</li> <li>• Bureaucratic</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of profile</li> <li>• Funding challenges</li> </ul>	<ul style="list-style-type: none"> <li>• Traditional rivalries or competition</li> <li>• Working to academic timetable</li> </ul>
Working well	<ul style="list-style-type: none"> <li>• Link into wide range of key partners and sectors</li> <li>• Authority among other partner organisations</li> </ul>	<ul style="list-style-type: none"> <li>• Flexibility</li> <li>• Responsive</li> <li>• Reach into areas</li> </ul>	<ul style="list-style-type: none"> <li>• Responsive</li> <li>• Ability to be agile</li> </ul>

The following case studies provide some examples of effective partnership working within CLT pilot areas:

### Case Study two:

#### Effective partnership working: Birmingham CLT

Birmingham CLT is focusing on reducing duplication, identifying gaps and working in a more productive manner to align community learning activities.

The CLT is concentrating on three disadvantaged areas of the city. ‘Local Operational Groups’ have been established to bring together organisations providing community learning in the three areas with community representatives and other relevant local organisations.

*“We’re providing a framework for collaboration with the right type of partners...a catalyst for bringing people together and the potential reach is huge”*

Each Local Operational Group is reviewing the level of current community learning activities in its area. Every member has been asked to contribute information. The analysis is aimed at identifying where different agencies can work better together, spot or avoid duplication and to help fill gaps in provision or respond to need.

Members of the Local Operational Groups also share local knowledge and informally feedback requests for courses from learners to each other. A key focus is understanding which courses are oversubscribed, where competition can be avoided and where take up of learning opportunities is low.

### Case study three:

#### Effective partnership working: Derby CLT

The CLT is an equal partnership between the Local Authority (the Adult Learning Service) and the Derbyshire Learning and Development Consortium, made up of 187 members. A key aim of the CLT is to give community learning a strong identity in Derby.

The intention is to ensure that people can understand how community learning provision links up between different organisations and that it does not get lost within the work of other local authority departments or key partners, where community learning is only one aspect of their wider activities.

*“The most considerable thing that’s happened is the launch... at that meeting there were 50 people, representation from a wide spectrum of organisations, that was the difference”*

Activities by the CLT have included a high profile launch event, use of publicity, including leaflets and a website, and organisation of learning activities and events such as The Festival of Learning.

The CLT is strengthening existing good partnership working within the City; for instance, local authority involvement has facilitated people being signposted to community learning providers as part of the Council’s ‘First Contact’ one-stop shop which is a system where local residents are directed to local services. Two new projects will bring together a range of partners and facilitate signposting: one on the risk of falls in older people; and one supporting person-centred planning for disabled people and their carers.

The CLT is looking at how overheads can be kept down by better collaboration, for instance by piggy-backing on each other’s events.

### 4.3 Engagement of communities and targeting disadvantaged learners

The engagement of local communities, in terms of existing learners and the wider community, in directing learning activities, planning activities and helping to champion community learning in local areas, was reported to be high on the agenda of every CLT area.

However, at the point of the first site visits, it was early days in regard to this area of work for most areas. This area of activity, particularly work to build the capacity of volunteers to be used to consult, was felt to be time consuming and resource intensive. Due to time constraints, most areas had been unable to consult with their local communities as part of putting together the application to become a CLT pilot. Instead, provider knowledge, especially through tutors, about their communities and learners was used in place of direct engagement.

Areas had, or were experimenting with using, different methods to gain feedback from existing students beyond tutor feedback and surveys. These included using iPads and the visual environment to encourage learners to vote for courses using post it notes or wall charts. Three of the CLT areas are taking part in the eReading Rooms pilot<sup>9</sup>. Later site visits to these areas will aim to capture information on the way this work is developing.

The CLT pilot areas are experienced in targeting different learners but participation in the pilot programme is an opportunity to build on existing approaches, to work to develop new areas of innovation and to target new 'types' of learners such as those recovering from an addiction, the homeless or people living in isolated areas that have not traditionally accessed provision.

However, CLTs are all at different stages in terms of strategies to consult with potential learners about their needs – especially with disadvantaged learners. CLTs either reflected on previous practice prior to being a CLT or referenced future plans to develop or build on work. Activity can be grouped into:

- **Signposting of community learning** For instance, by providing dedicated websites for community learning activities that collate all relevant provision across a range of providers (for example in West of England CLT and Cheshire) or the recruitment of Community Learning Champions to consult with and recruit learners.
- **Broadening of locations and content** for both consultation and learning activities and moving this away from formal learning environments and into community centres and/or places that are familiar and trusted by the target group. For example, in Sunderland, consultation and learning is taking place in, and by, support organisations for families affected by drugs misuse. Choosing the right venue is key; schools and community centres are important in providing access to safe and

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<sup>9</sup> eReading Rooms – the concept: 'A vision for dramatically increasing the numbers of people engaging in informal learning by providing free and friendly eReading Rooms where, through the power of the internet, any topic can be discovered and explored, revolutionising informal learning and placing the world of learning at people's fingertips' (OCF, 2012)

familiar environments. All of the pilot areas emphasised the importance of working with specialist partners and those organisations that are already active, or have reach, into local communities. For instance, in West Sussex Liberate are working with Brighton and Hove Albion Football Club to engage with male learners. In some instances, this may be about piggybacking onto other agendas such as Sheffield CLT and the Building Successful Families project (Sheffield City Council's response to the Troubled Families initiative).

- **Offering flexibility/self organised learning** in course delivery, content and length. Taster sessions are useful in demonstrating the content of learning and in promoting activities to potential learners. Providers stressed the importance of allowing learners to design the courses. For some special circumstances, where a learner was assessed as having special needs or severely lacking in confidence, tutors had provided some additional one to one support. In a number of areas, posts are being created to allow tutors to facilitate the creation of self organised groups and to design and establish new community learning activities with potential learners.
- **Providing 'hybrid' learning opportunities** where publicly funded short taster courses lead into an introduction to a self-organised group for longer term learning. For instance in Luton and Bedfordshire, where providing training, capacity building and quality support for leaders of self-organised groups to ensure high quality learner experience is part of the CLT's proposals.
- **Provision of incentives** for consultation events such as gifts – 'freebies' (one provider was offering food parcels that had been donated), refreshments and celebration events to showcase the outputs from a course (for example, food or crafts) in attracting potential learners.

A number of the CLT pilot areas are reviewing their 'volunteer offer,' in particular in terms of their ability to build volunteer capacity and facilitate options for encouraging continued engagement. Incentives to encourage volunteering were being considered, such as free courses.

Engagement of local communities, including work with volunteers, is an area that the evaluation will certainly return to for site visits two and three. The following case studies demonstrate ways of recruiting potential learners in the community.

#### **Case study four:**

##### **Involving the local community: West of England CLT**

West of England CLT is working with and supporting a number of organisations from within the community. They have maintained a close relationship with partners and providers that are not currently being used as an SFA funded provider. The CLT is working to continue its existing work with schools and children's centres to consult potential learners about their needs and learner preferences.

The primary school is a safe and convenient community venue in which to consult, recruit and facilitate learning. An example of this in action was a project, conducted prior to the CLT application, to target parents with a child starting reception year in an area of high unemployment. On the first day of term a facilitator met with parents leaving their child at school and held a meeting to engage them in community learning. Out of this a club was formed and the parents met every week and designed their own programme of learning.

This programme has included school fundraising, supporting their children to read and learning about feeding families on a budget. A few of the parents in the group have applied for positions on the school PTA. The community learning facilitator / tutor has supported them in this application process.

### **Case study five:**

#### **Increasing participation: Sunderland's CLT**

Sunderland has successfully used a range of incentives as a way to engage with the community to carry out consultations that give local people the opportunity to share their own vision for what community learning should look like in their area, and to give potential learners a taste of learning with a view to them progressing onto further learning.

The core CLT team are based in the Bunny Hill Customer Service Centre, a one stop service facility including a walk in health centre, doctor's surgery, children's centre and library. They have organised informal tea and chat consultation sessions and a range of taster days based around themes such as 'new you', healthy body, healthy mind', these are advertised via posters in the centre and word of mouth through service user meetings. In addition to discussing the content and style of learning, the barriers to learning are brought out and solutions to these barriers are discussed. This model has been rolled out successfully to contracted providers in the community and they have adapted the model to meet their needs.

As an example, at the Salvation Army's Swan Lodge Life House, learners living in the hostel taking part in a cooking on a budget course, invited fellow residents not currently engaged in learning to sample their food and have the opportunity to talk to them and the tutor about their experiences, the course and how it could be adapted to suit their individual needs.

The case studies below provide an example of the way in which rural and disadvantaged learners have been targeted in two areas, with the aim of helping them to design their own learning activities aligned to their needs.

### **Case study six:**

#### **Targeting rural learners: Community Learning in Cumbria**

Community learning in Cumbria targets the Eden area, which is extremely rural. Eden is a Big Society vanguard area and the CLT will link into this existing work.

Learners will be engaged via local managers, voluntary groups, parish councils, town councils and even by local pub landlords, to find out what is wanted in terms of learning. The CLT's third sector partners are leading on the consultation. Activities include:

- A survey asking core questions of almost 500 community groups in the Eden area in terms of interest, involvement and potential involvement in community learning in Eden
- Organisation of a conference to gauge interest in community learning
- Running of events e.g. in local supermarkets and pubs to talk to the public informally about awareness, interest, needs and involvement of/in community learning
- Specific targeted work with 40 community led planning groups across Eden, three of whom have had previous Big Society involvement
- Specific targeted work with three less proactive community-led planning groups across Eden accessed from an existing database.

From the 143 village halls in Eden, six 'active' and six 'inactive' in community learning will be targeted. Furthermore, five community exchange groups which are village hall based will be asked to host local talks and guests such as health visitors, social services, and local councillors.

## Case study seven:

### Targeting disadvantaged learners: Blackburn with Darwen CLT

Blackburn with Darwen CLT aims to motivate and support people who are disadvantaged by working to create a model of delivery where community learning has a positive impact on people's lives. Their motivation for becoming a CLT pilot area was to demonstrate what can be done with community learning in an area of high deprivation, using Blackburn with Darwen's existing devolved model of public service delivery which operates on a neighbourhood scale.

The CLT is building on their Council's model of grassroots community involvement branded as "Your Call". Community Officers who are part of the CLT structure convene 'Ward Solution' meetings. Any local resident that attends the meeting can say what they feel is needed locally and the Community Officers assess what learning, training and equipment would be necessary to enable volunteers to get on with the job. This might be something straightforward like loaning brooms and shovels or providing Health and Safety training.

This process is aimed at building capacity in the community, by enabling citizens to set the agenda and be part of their own solution to issues raised - building community cohesion and gaining skills in the process. Adult learning is key to the process as without it, residents wouldn't have the confidence and skills to make a difference in their communities.

*"Its innovation is (that) although we offer free learning, there is an expectation built into the course or workshop that those in receipt of the learning will give something back to their community"*

The CLT has been given the freedom to widen the definition of community learning, by bringing in activities which cover a broader range of learning opportunities some of which may be very short or happen in an informal setting. Tutors and community officers ensure that learners are then given practical opportunities to use the learning so that it has a wider community impact. For example community clean ups and winter patrols, which involve pavement gritting and checking on vulnerable older people, training volunteers to run community centres, gaining skills in conflict management and resolution which can then be applied to manage local neighbourhood disputes or cohesion issues stemming from extreme ideologies.

## 4.4 Pound Plus: Maximising funding and Investment

Information about Pound Plus is reliant on the accuracy and detail of CLTs completed proformas submitted in December. This information has not been discussed with CLTs or interpreted by the evaluation team. The information will be discussed with CLTs during visit 2 and then again at visit 3 after CLTs have had the opportunity to add further Pound Plus examples and information.

Generating additional income and revenue is central to the objective of driving up participation in community learning within a very constrained public funding environment.

'Pound Plus' allows pilot CLT providers to show that the initial investment of public funding in community learning has a crucial and positive leverage value that, when final computations are made at the pilot year end, can be expressed as a multiplying factor of the initial public funding investment. In other words, this calculation will enable us all to evidence that for every one pound of public funding investment a further 'x' pounds have been generated to extend reach, provision and impact – sums that may or would not be possible without the initial investment.

CLT pilots are helping to test approaches to measuring this added value in different ways according to their local circumstances. All CLT pilot were asked to return a proforma by the end of December 2012 listing their intended approaches to generating and quantifying Pound Plus income. At this stage CLT pilots were not asked to quantify the value of Pound Plus income, although a number of pilot areas have already started to do this.

A wide range of Pound Plus approaches are being developed. Most of the CLT pilots receive income from sources other than the Government's Community Learning Budget (e.g. other Council Services, Adult Skills Budgets, specific grants). At this stage however it is difficult to assess the extent to which the combination of these different income sources create 'Pound Plus' by delivering additional benefits (or value for money) over and above the core purpose of each of the funding sources. This will be explored further later in the evaluation process.

In addition to additional income, other commonly cited areas of Pound Plus included fee income, contributions in kind (particularly from partnership activity) and the use of volunteers.

Listed below is a short summary from the CLT pilot proformas, highlighting key areas that CLT pilots are intending to focus on in the months and years ahead.

### 4.4.1 Fee Income

The majority of CLT pilots said that they intended to develop (or further develop) a differentiated fees policy where Government funding was primarily focused on disadvantaged individuals and where those individuals who could afford to make a higher contribution to the cost of the course did so. However, CLT pilots felt that this would take time to implement and the overall impact on income generated and learner numbers would be hard to determine.

Concerns were raised about increasing fees and being undercut by other more competitive providers. For example, one area noted:

*“We have begun to charge more for some programmes. Problem is that where we raise fees and we charge more, with the intention of cross subsidising learning for less well off, we may well find competitors entering the market at lower fees, we will lose market share and therefore the opportunity to cross subsidise”*

ILR data analysis and evolving fee policies across the CLT pilots will provide quantifiable evidence of the impact of fee strategies for CLTs, BIS and the Agency as the evaluation progresses.

#### 4.4.2 Sponsorship

CLTs have been asked, by the end of the pilot, to provide a list of external sponsorship income, details of sponsors (e.g. named employers) and evidence of the aims and objectives of the sponsorship. Potential sponsorships are actively being sought by a number of areas, for instance with large employers. In one CLT, an Employer Engagement Manager had been recruited to promote and seek opportunities for sponsorship.

In one area John Lewis has sponsored, and intends to continue to sponsor, a Celebration of Achievement award. In another area every learner who successfully completes a specific course is given a £10 voucher by the Salvation Army to obtain household goods.

#### 4.4.3 Tenders/Grants

CLTs have been asked to provide details and financial value of successful tenders or grants received as a result of setting up the CLT. They have also been asked to identify the aims and objectives of each successful tender or grant and to identify whether the tender/grant is focused on delivery of learning, infrastructure development or knowledge transfer.

A number of areas have successfully secured additional funding since becoming a CLT pilot area, including:

- CLIF grants which complement the work within the CLT
- Grants from businesses such as Lloyds TSB
- Bursary donations
- Contributions from Big Lottery Fund and Heritage Lottery Fund.

CLT pilot intentions under this category include the setting of targets, for instance:

*“Partners to the project are actively seeking additional funds from grants and tenders and estimate an outcome of between £50 000-£100 000”* (Liberate, West Sussex)

#### 4.4.4 Revenue from sale of products/services outside of core learning services

CLTs are identifying and quantifying the value of sale of products/services outside of core learning services (i.e. teaching and learning). This could include books, training materials, consultancy, training, hiring out facilities. Comments from CLT pilots (in the Pound Plus Proforma) about their intentions under this category include:

- *“ALDD community Art classes offered with a partner organisation with work being exhibited at the end and an admission charge made to the exhibition”* (Liberate, West Sussex)
- *“A range of resources including posters, calendars, dads guide cards which provide a small unrestricted income into the Fathers Plus service. Fathers Plus delivers workforce development training across the country which generates a small surplus which is reinvested into the service”* (Sunderland)
- *“Learner Membership of the Community Learning Trust to be promoted. As part of this activity members will be able to access resources at reduced rates which will generate additional income to the trust”* (Learning for All, Luton and Bedfordshire)

#### 4.4.5 Income from other Government sources

CLTs have been asked to identify new income secured from Government sources as a result of CLT activity which provides additional resource for community learning. Sources of funding identified by the pilot areas include: income from local authorities to deliver targeted programmes e.g. health, offenders (one area anticipates income in the region of £30,000-£50,000' from this activity); guidance interviews from the National Careers Service; public health funding; and the use (where appropriate) of the Adult Skills Budget to encourage progression from community learning programmes.

#### 4.4.6 Contributions in Kind

CLTs are identifying a monetary value for contributions in kind and provide details of what these contributions are and who is providing them. The monetary value needs to be the direct cost saving for the CLT, ensuring that a greater proportion of Government funding is invested in learning. Contributions in kind could include accommodation, staff, services, consultancy and equipment.

CLT pilots recorded a large number of intentions under this category:

*“This is likely to be our single largest area of Pound Plus. There are examples of rooms being gifted, hospitality for meetings, sharing of ideas and more openness”* (Trust in Learning, Exeter)

Examples include:

- Use of premises, for instance "local churches for floristry courses", "use of Town Council social club to deliver a health and well being course, "use of school and other venues for delivery of community learning courses" (calculated in one area as 124hrs at approx £15 per hr) and "20 years lease of the building for free from the Local Authority"
- Free publicity for courses, for instance the use of the bus station for free publicity and promotion at set times
- Assistance with recruitment of learners
- Access to staff and partner organisations' time.

#### 4.4.7 Shared services

Shared services is an overarching term used to describe the implementation of more efficient systems, services and processes developed directly as a consequence of new ways of working. Pilot areas are exploring options such as establishing shared project management and administration of community learning and producing shared marketing for courses and shared delivery. For example:

*"The Fathers Plus service is housed within the Families and Parenting service office base and shares rent, building overheads, IT systems, HR, Admin, Finance and Management costs providing efficiency savings"* (Sunderland's CLT)

*"Partners are sharing the following services: Accommodation, teaching space, teaching resources, marketing space, administrative support"* (Liberate, West Sussex)

For those working across local authorities to deliver community learning to a larger area, there were benefits to associated organisations such as OFSTED and Skills Funding Agency in having less areas to inspect and support.

#### 4.4.8 Use of volunteers

Pilot CLTs may be using volunteers for a range of tasks supporting the infrastructure and delivery of community learning. CLTs have been asked, by the end of the pilot, to identify the total number of volunteer hours utilised as a direct result of CLT developments.

The monetary value of this volunteering is the direct cost saving to the trust as a result of using volunteers and is calculated by multiplying volunteer hours by £11.09. This is the Community Development Foundation's financial proxy for one hour's volunteering, based on the 2010 ONS Annual Survey of Hours and Earnings (ASHE) median gross hourly earnings rate. This figure is also used by the Government's Community First project (overseen by Cabinet Office/OCS).

A number of areas are intending to recruit Community Learning Champions.

*“We would like the opportunity to investigate the use of volunteers for use with discreet groups for offsite work and evenings – ‘a community learning volunteer group” (Solihull Source)*

Other areas are exploring the feasibility of increasing their use of volunteers or have begun to work with volunteers for this first time as a result of establishing the CLT.

Volunteering is one of the CLT’s key objectives. We therefore intend to utilise volunteers through the different aspects of CLT activity, e.g. helping to engage learners and non-learners to determine their needs, helping to deliver provision and upskilling the volunteers themselves. However, these activities have yet to be determined as the projects being in their early stages of development. One potential example that has been tentatively suggested is the possibility of drawing on university students in our project to deliver tailored ICT learning to social housing residents affected by the upcoming introduction of online system for Universal Credit. University students may also be able to develop appropriate resources as well as deliver learning to the residents” (Kent CLT)

#### **4.4.9 Setting up self organised groups**

Finally, pilot CLTs may be providing small grants or contributions in kind (such as accommodation) for specific groups to become self organised. These are typically activity classes that are not seeking to progress and may have the characteristics of clubs. CLTs such as Sunderland and West of England have supported a number of self organised groups previously through their partners. See case study 4 in section 4 for more detail on how providers are migrating away from ‘blocked’ classes into self organised groups with minimal support from the provider in venue that is low cost or free (e.g. school) with the occasional support of a tutor.

## 5. Moving forward

This 'early stage' collection of evidence has found a mix of impacts playing out in the areas as a result of participating in the pilot. Later visits will aim to tease out impacts of the particular structures and approaches. The evaluation continues into July 2013. The next qualitative site visits take place in February/March. Information collected over the next six months will build on what is set out in this report.

The table below sets out the areas the evaluation will aim to explore as part of the next site visit.

**Table Four: Areas to explore further**

<p><b>Partnership working</b></p> <ul style="list-style-type: none"> <li>• Practice that helps or hinders</li> <li>• Quality of leadership and strategy</li> <li>• Raising the profile of CLT</li> <li>• Hooking new partners to the table</li> <li>• Developing new areas of work</li> <li>• 'Navigating' wider change in the areas</li> </ul>	<p><b>Impact of CLT structures</b></p> <ul style="list-style-type: none"> <li>• Rationale for structure (if any)</li> <li>• Impact(s) of CLT structure on process and partnership working</li> </ul>	<p><b>Pound Plus understanding</b></p> <ul style="list-style-type: none"> <li>• Barriers and enablers to maximising Pound Plus in the areas</li> <li>• Why chose certain indicators and not others</li> <li>• Strategies and concerns around collecting and collating evidence</li> <li>• General lessons that would benefit other areas delivering Community Learning</li> </ul>
<p><b>Engagement of communities</b></p> <ul style="list-style-type: none"> <li>• What's worked well</li> <li>• What's worked less well</li> </ul>	<p><b>Delivery</b></p> <ul style="list-style-type: none"> <li>• Impacts on learners from the perspective of providers, tutors and champions</li> </ul>	<p><b>Becoming learner centric</b></p> <ul style="list-style-type: none"> <li>• Signposting or helping learners to navigate the Community Learning offer in an area</li> <li>• Learners progression onto further learning or employment</li> </ul>

# Appendix A: Pound Plus / Value for Money

## What is Pound Plus?

1. 'Pound Plus' is a new term that we're using to describe how learning providers can show how they are maximising the value of public investment. Generating additional income and revenue is central to the objective of driving up participation within a very constrained public funding environment.
2. Pound Plus refers to additional income generated by providers over and above core income from the Government's Community Learning budget (and/or other core income sources used historically to fund community learning). This includes income generated through course fees, financial sponsorship, access to new learning spaces made available at no or reduced cost; the use of volunteer workers; donations of equipment or consumable items; access to other funding sources or grants.
3. Pound Plus will allow pilot CLT providers to show that the initial investment of public funding in community learning has a crucial and positive leverage value that, when final computations are made at the pilot year end, can be expressed as a multiplying factor of the initial public funding investment. In other words, this calculation will enable us all to evidence that for every one pound of public funding investment a further 'x' pounds have been generated to extend reach, provision and impact – sums that may or would not be possible without the initial investment.
4. Community Learning Trust (CLT) pilots are helping to test approaches to measuring this added value in different ways according to their local circumstances. Other non-pilot community learning providers are also keen to explore how this can be demonstrated in their areas. This guidance is designed to help trusts work with BIS and the Agency to develop and test a wider Pound Plus strategy across community learning.

## Community Learning Trusts and Pound Plus

5. The Community Learning Trust prospectus asked applicants to detail their "proposed financial strategy to maximise the value of public funding (Pound Plus), for example any innovative approaches to volunteering, match funding, pooling resources, business sponsorship and using fee income from people who can afford to pay in order to reach those who cannot."
6. This Pound Plus income will need to be recorded by pilot trusts and an estimate of its relative value calculated. Pilots should focus on Pound Plus income generated as a result of setting up the CLT and implementing new ways of working.

7. Pilot CLTs also need to be able to demonstrate that the additional resources are providing good value for money. This entails demonstrating that the additional investment is leading to a real growth in high quality community learning opportunities reaching more people, especially those who are regarded as disadvantaged.

## Identifying and Recoding Pound Plus

8. The chart on page 46 summarises how Government funding is 'multiplied' in order to increase the total investment in the delivery of community learning. This could be through securing additional income (green boxes) or obtaining contributions in kind or efficiency savings that reduce overall costs (pink boxes).
9. Pilot CLTs are also developing new ways of working that improve the overall value for money of the Government investment (peach box). This might include developing an improved curriculum offer, providing better progression pathways or removing duplication in provision.
10. The overall effectiveness of the investment in community learning involves understanding the full range of outcomes (blue boxes). This includes analysis of learner data (participation, targeting of disadvantages, success etc.) as well as an understanding of the wider outcomes (such as the impact on health and well being, crime, families etc.).
11. The examples in the chart have all come from initial proposals submitted by CLT Pilots. Individual pilots may be using different approaches for generating Pound Plus income so not all of the categories in the chart may be appropriate/applicable.
12. The tables on the following pages provide more information about how Pound Plus and value for money can be monetised or quantified. The final table is a template that can be used by pilots to summarise and record Pound Plus income and cost savings (apart from fee income which will be recorded separately).

**Pound Plus (Direct Income)**

Category	Comments/Details
<p>Fee Income</p> <p>(Courses on the ILR)</p>	<p>RCU will work with providers to quantify the value of fee income and how this has changed as a result of the pilot. Analysis will utilise ILR returns, fee policies and accounts.</p> <p>Analysis will quantify:</p> <ul style="list-style-type: none"> <li>- total fee income generated</li> <li>- the relationship between fee income and deprivation</li> <li>- fee collected per guided learning hour.</li> </ul> <p>Pilots need to supply RCU with copies of Fee Policies and a summary of fee income received from their accounts.</p> <p>Pilots should indicate whether the fee income can be/is being re-invested in community learning.</p>
<p>Fee Income</p> <p>(Non ILR courses including fully funded provision)</p>	<p>Pilots should separately record details of fee income collected from non-ILR courses including fully funded provision. They should provide a summary of the fee income, the volume of learners, the type of courses and the profile of the learners. They should also indicate the extent to which this is new income as a result of establishing the pilot CLT.</p>
<p>Sponsorship</p>	<p>Pilots to provide a list of external sponsorship income, details of sponsors (e.g. named employers) and evidence of the aims and objectives of the sponsorship. Please indicate whether or not this is new income.</p>
<p>Successful Tenders/Grants</p>	<p>Pilots to list details and financial value of successful tenders or grants received as a result of setting up the Trust.</p> <p>Please identify the aims and objectives of each successful tender or grant. Identify whether tender/grant is focused on delivery of learning, infrastructure development or knowledge transfer.</p> <p>Indicate the timescale for the tender/grant and how much income is received in the current academic year.</p>
<p>Revenue from sale of products/service outside of core learning services</p>	<p>Pilots to list and quantify the value of sale of products/services outside of core learning services (i.e. teaching and learning). This could include books, training materials, consultancy, training, hiring out facilities.</p> <p>Please supply revenue which is attributable only to pilot activity.</p>

Income from other Government sources	<p>Pilots to identify new income secured from Government sources as a result of CLT activity, which provides additional resource for community learning. Identify the value, the Government Department and Fund and the purpose of the funding.</p> <p>Do not include historical income from other Government sources (such as LA grant, adult skills budget) which would traditionally be regarded as part of the core funding for the service.</p>
Other	Please specify any other income secured as part of CLT activity.

### Pound Plus (Cost Savings)

Category	Comments/Details
Contributions in Kind	<p>Pilots to identify a monetary value for contributions in kind and provide details of what these contributions are and who is providing them. The monetary value should be the direct cost saving for the CLT from the contribution in kind that ensures that a greater proportion of Government funding is invested in learning. Contributions in kind could include:</p> <ul style="list-style-type: none"> <li>• Accommodation</li> <li>• Staff</li> <li>• Services (e.g. IT support)</li> <li>• Consultancy/expertise</li> <li>• Equipment (e.g. computers)</li> </ul>
Shared Services	<p>Shared services is an overarching term used to describe the implementation of more efficient systems, services and processes developed directly as a consequence of new ways of working within the pilot CLT.</p> <p>Pilots should identify a monetary value for the annual cost savings that result from implementing a shared service.</p> <p>Shared services could include:</p> <ul style="list-style-type: none"> <li>• Shared IT infrastructure or IT support</li> <li>• Coordinated marketing and promotion</li> <li>• More efficient 'back office' processes such as procurement, HR support, finance</li> <li>• Coordinated staff development and training.</li> </ul>

<p>Use of Volunteers for supporting the infrastructure of Community Learning</p>	<p>Pilot CLTs may be using volunteers for a range of tasks supporting the infrastructure and delivery of Community Learning.</p> <p>Pilots should identify the total number of volunteer hours utilised as a direct result of CLT developments. The monetary value is the direct cost saving to the trust from using volunteers and is calculated by multiplying volunteer hours by £11.09. This is the Community Development Foundation's financial proxy for one hour's volunteering, based on the 2010 ONS Annual Survey of Hours and Earnings (ASHE) median gross hourly earnings rate. This figure is also used by the Government's Community First project (overseen by Cabinet Office/OCS). Examples of the use volunteers include:</p> <ul style="list-style-type: none"> <li>• Identifying and promoting community needs</li> <li>• Supporting curriculum development</li> <li>• Signposting and providing advice/guidance to potential learners</li> <li>• Infrastructure support</li> <li>• Delivery support.</li> </ul>
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### Learning Delivery – Value for Money

Category	Comments/Details
<p>Efficiency of curriculum</p>	<p>Pilot CLT initiatives may lead to more efficient delivery of the curriculum through, for example, the removal of duplication of provision.</p> <p>We are not expecting pilots to monetise the impact of these developments but it would be helpful if they could give details of any initiatives in this area and what they feel the impact is likely to be.</p> <p>Note: RCU analysis of learner records will provide evidence of the impact of changes in the efficiency of curriculum delivery on learner numbers.</p>
<p>Small grants/contributions to support self-organised group activity</p>	<p>Pilot CLTs may be providing small grants or contributions in kind (such as accommodation) for specific groups to become self organised. These are typically activity classes that are not seeking to progress and may have the characteristics of clubs.</p>

	<p>Pilots should identify the monetary value of the grant or contribution in kind provided by the CLT to allow these groups to become self organised? How many learners are involved?</p> <p>Pilots should also record the total cost if the group had continued to be taught in the traditional manner? (tutor cost + overheads)</p> <p>Please identify the overall cost saving</p>
Effectiveness of curriculum	<p>Pilot initiatives may lead to a more effective curriculum offering - for example new subjects or better progression opportunities. This may lead to increased learner participation, particularly amongst targeted groups.</p> <p>We are not expecting pilots to monetise the impact of these developments but it would be helpful if they could give details of any initiatives in this area and what they feel the impact is likely to be.</p> <p>Note: RCU analysis of learner records will provide evidence of the impact of changes in the effectiveness of curriculum delivery on learner numbers and the profile of learners.</p>

## Outcomes

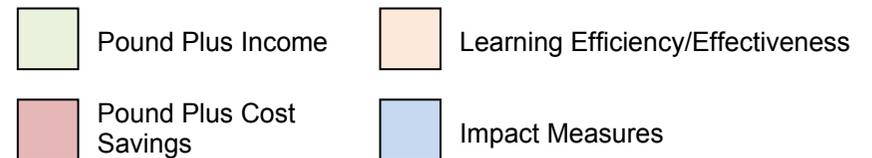
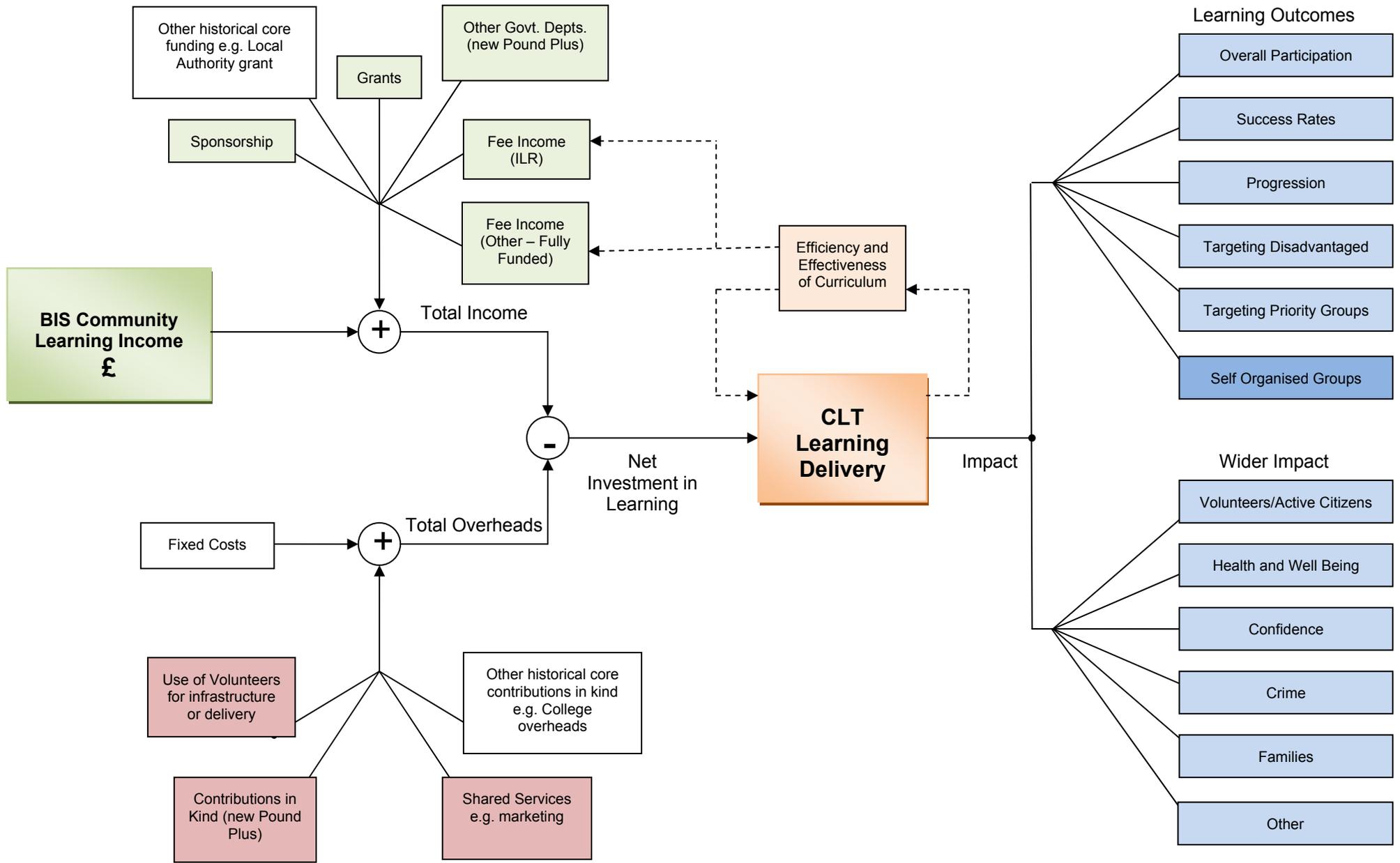
Category	Comments/Details
Learning Outcomes  (ILR Analysis)	<p>RCU will provide an analysis from ILR returns and the data collection tool showing:</p> <ul style="list-style-type: none"> <li>• A comparison between pilot area activity in 2012/13 and the activity in the same areas in the three years prior to the pilot starting (2009/10 – 2011/12). This will allow us to assess distance travelled during the pilot and how this relates to past performance and trends</li> <li>• A comparison with national and regional averages (to assess whether changes in the pilot areas were specific to the pilot or part of any national or regional trend)</li> <li>• A comparison with 'control areas' based primarily on statistical neighbour local authority districts but also taking into account the organisational structure of community learning.</li> </ul>

	<p>The specific outputs from the data analysis is likely to involve learner volumes, participation rates and retention rates by:</p> <ul style="list-style-type: none"> <li>• Geographical area (Local Authority ward level)</li> <li>• Indices of Deprivation (IMD 2010) based learner home location</li> <li>• Learner characteristics (ethnicity, age, learning disability, gender)</li> <li>• Course category (PCDL, Family Learning, NLDC, FLNN), subject area and level of study (where appropriate)</li> <li>• Engagement with new learners or repeat learners</li> <li>• Contractor/subcontractor delivery and delivery location.</li> </ul>
<p>Learning Outcomes  (Non ILR including self organised groups)</p>	<p>Pilots should record details of other learning activity that has occurred as a result of setting up the CLT that will not be recorded on the ILR. This could include, for example, self funded and self organised groups and clubs that are using accommodation and other infrastructure (such as promotional materials or signposting services) provided by the pilot CLT.</p>
<p>Wider Outcomes</p>	<p>Pilots may wish to use the Wider Outcomes Tool developed by NIACE to demonstrate the wider impact of Community Learning. Some Trusts may also be experienced in using SROI analysis. For further information on SROI or the wider impact tool please contact NIACE.</p>
<p>Training of Volunteers</p>	<p>Pilots could be providing training for new volunteers who will become a key resource for the local community.</p> <p>Pilots should identify the total number of volunteers they anticipate training and if possible identify the areas in which they are likely to be engaged. In order to monetise the benefit it would be necessary to multiply the number of hours of activity anticipated per year by the hourly rate (£11.09) – we recognise that this may not be predicted accurately.</p>

## Pound Plus Summary Template

This template can be used by pilots to summarise Pound Plus Income (or cost savings). Income collected from course fees (ILR provision) will be collected and analysed separately. The table only includes those areas where a monetary value can be easily assigned. Other areas which may lead to a financial benefit, such as improving the efficiency of curriculum delivery or generating wider impacts for the community should be recorded separately.

Category	Details and Comments	Value (£)
Fee Income (Non ILR)		
Sponsorship		
Tenders/Grants		
Revenue from the sale of products/services outside of core learning services (or learning recorded on ILR)		
Income from other Government Sources		
Contributions in Kind		
Shared Services		
Use of Volunteers to Support Infrastructure and for the delivery of learning		
Training of new Volunteers		
Small grants/contributions to support self-organised group activity		
Other Sources		



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