

# Sector Skills Assessment 2010

## WALES



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# Foreword

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Our purpose as a sector skills council is to work with employers, partners and policy makers to improve the skills, performance and professional development of the UK's lifelong learning workforce. We provide the strategic perspective for workforce planning and development for the sector across the four nations of the UK.

This work benefits each UK nation by improving the educational standards of the lifelong learning sector workforce; by advancing the education of those in lifelong learning, and by improving the education and skills standards of the workforce as a whole, thereby improving the nation's competitiveness.

In order to deliver these benefits, we undertake an annual review of the lifelong learning sector in Wales to enable us to better understand the current and future skills drivers facing the lifelong learning sector in order to provide strategic solutions which will ensure that learning professionals have the right skills and knowledge to meet demand.

The results of the 2009 Sector Skills Assessment identified a number of skills priorities, including:

- Skills for managing change
- Skills in working with others, including partnership and collaboration
- General business skills
- Key skills, such as literacy, language and numeracy
- Teaching and learning related skills

Since these findings were published, Lifelong Learning UK in Wales has taken significant action to address these skills priorities.

We produced 'Using Technology to Support Learning for Teachers, Tutors and Trainers in the Lifelong Learning Sector in Wales', an Application guide on new technologies. The guide aims to form a bridge between the professional standards on the effective use of technology to support teaching and learning and their implementation within each specific sub-sector of lifelong learning in Wales. These standards list the values, knowledge, understanding and professional practice expected of all teachers in the sector. For the purpose of this guide, the generic term 'teacher' refers to teachers, tutors, trainers, lecturers and instructors. (*Using Technology to Support Learning for Teachers, Tutors and Trainers in the Lifelong Learning Sector in Wales, 2009*).

We have supported strategic planning in community development by working in partnership with the Communities Division of the Welsh Assembly Government has to develop the first Community Development Workforce Action Plan for Wales. 'Working with Communities' has built upon the earlier research and solutions developed for the lifelong learning *Sector Skills Agreement* for Wales (LLUK 2007). The action plan provides a training and development framework for the community development workforce in Wales.

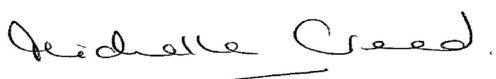
To support training in youth services Lifelong learning UK is assisting in the development of a Youth Work Workforce Manifesto for Wales, which is intended to help shape the youth work workforce of the future. It provides an over-arching framework for workforce development in Wales. We will continue to work in partnership with the Welsh Assembly Government, Youth Work employers and partner agencies to facilitate the development of a national strategic workforce development group and a National Workforce Development Plan to deliver the Manifesto in Wales.

In May 2008 Lifelong Learning UK submitted recommendations to Welsh Assembly Government on the next steps that would be required to undertake the much needed reform of the qualification framework for the Teacher/Tutor/Trainer and Assessor workforce in Wales (for Further Education, Work Based Learning, and Adult Community Learning) to enable the development of a coherent Teaching Qualification Framework (TQFW) compatible with Credit & Qualification Framework for Wales (CQFW) policy principles. Throughout 2010, LLUK and key stakeholder partners have continued to lobby DCELLS on the priority of this reform agenda for Teachers, Tutors and Trainers in Wales – this remains the primary priority for the lifelong learning sector.

These strategic approaches to overcome skills gaps are mirrored by lifelong learning employers' own efforts to overcome the issues that result from skills gaps in their workforce.

Further training is used by most employers to tackle skills gaps. Among lifelong learning employers, almost three-quarters also relocate the work within their organisation, which is approximately 22 percentage points higher than all sectors. Almost two-thirds change working practices and the same proportion increase/expand trainee programmes. In comparison, recruitment related methods are used by fewer employers. Other measures identified by responding employers included: in-house training (seven per cent), more/on-to-one supervision (five per cent), shadowing/mentoring (three per cent), team building exercises (two per cent), general training/coaching (two per cent) and induction training (two per cent).

In July 2010 the Welsh Assembly Government published *Economic Renewal: A New Direction*. This policy identifies that the foundation of any economy is its working population and that education and skills at all levels are vital for economic growth and prosperity in Wales. Delivering this is a shared responsibility for all of us and we look forward to having a significant role in delivering the needed skills development for the nation.



**Michelle Creed**

Director, Wales

Lifelong Learning UK

# Executive Summary

This document is the Sector Skills Assessment for Wales 2010, a 'state of the nation' report identifying employer skills needs in the existing and future workforce within the social, economic and political landscapes of Wales. It provides employers with intelligence on future skills needs so that skills development can be prioritised for the short, medium and long terms.

This report provides a comprehensive overview of current and future skills and drivers of skills demands in Lifelong Learning UK's sectors in Wales, namely:

- Career guidance (CG)
- Community learning and development (CLD)
- Further education (FE)
- Higher education (HE)
- Libraries, archives and information services (LAIS)
- Work based learning (WBL)

Wales provided employment to 1.32 million people aged 16 and had an employment rate of 66.7 per cent in 2010

The lifelong learning sector in Wales has just over 2,600 employers, representing a workforce of around 97,600. Between 53 and 60 per cent of the lifelong learning workforce in Wales are female and over 90% are White – both these figures are similar to the UK average. In terms of qualifications, 75 per cent of the workforce in Wales qualified to NVQ Level 4 or above, which is higher than any other UK nation.

Drivers of skills demand in Wales include the current economic situation, new and existing legislation and policies relating to various issues such as young people; the provision of information, advice and guidance; new ways of learning delivery including bilingualism; and new technologies. Based on our analysis of the drivers of skills demand in the lifelong learning sector, it can be said that as public funding faces a squeeze, there will be the need for more efficient use of resources, both material and human. More will have to be done by effective collaboration both within and outside the sector. Efficient utilisation of existing and new resources, including digital technology and new/social media will be required. New ways of working in order to deliver learning and information should be introduced. The importance of learning delivery in Welsh will have to be understood. For all this, there will be a requirement for the workforce to be agile in order to adapt and transfer their skills to meet changing needs. All these changes will require strategic planning and leadership to ensure organisations, management and the total workforce are prepared to work competitively in a world where public funding is limited and technology is rapidly advancing.

Skills shortages reported in the lifelong learning sector in Wales include:

- Delivery of learning or information in Welsh
- Community engagement and development skills
- Partnership working skills
- Literacy skills
- Fund raising skills

Skills gaps reported in the lifelong learning sector in Wales include:

- Delivery of learning or information in Welsh
- Promoting and marketing skills
- Fund raising skills
- Management skills
- Delivery of e-learning skills

According to data from Future Skills Wales (2005), generic skills were most commonly reported to be lacking amongst staff and include:

- team working skills
- problem solving skills
- customer handling skills

According to 2010 data collected through LLUK's survey, 85 per cent of employers in Wales had funded or arranged off-the-job training in the 12 months prior to the survey. The equivalent figure for the lifelong learning sector was almost identical at 84 per cent. The main barriers to providing training or development opportunities to staff were that employers could not spare staff time and a lack of funding.

According to forecasting data from Working Futures, employment levels in the Wales lifelong learning sector are expected to rise by almost 3 per cent between 2007 and 2017, which is almost half the growth rate across all sectors in Wales. These predictions are somewhat similar to trends across the UK.

In terms of the future, basic skills and Welsh language skills are seen as continual future skills needs. Future changes that are anticipated by the lifelong learning sector in Wales include:

- Managing change, especially the ongoing challenging economic situation
- Responding to the learner voice, especially as learners are required to pay more fees
- Commissioning skills, especially when drawing on reduced public funding
- Learning coaching skills
- Digitisation skills with social networks being used as learning environments

Current research undertaken as part of this Sector Skills Assessment indicates that the skills priorities in Wales continue to be similar to that of 2009, even though they have to be viewed in the changing economic and political climate. Skills priorities for 2010 are:

- Collaboration, partnership working including engagement with communities
- Skills relating to the utilisation of e-technology skills
- Management skills
- Basic skills of literacy and numeracy as well as ICT skills
- Transferable skills
- Welsh language skills
- Strategic leadership skills

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The report makes a number of recommendations for employers, stakeholders and policy makers that are vital for the continuous improvement of skills levels and productivity in the lifelong learning workforce and across all sectors.

# Section 1: Introduction

Lifelong Learning UK is the independent employer-led Sector Skills Council responsible for the professional development of those working in the lifelong learning sector across the UK. Lifelong Learning UK represents around 1.2 million people working in lifelong learning in England, Northern Ireland, Scotland and Wales and is the voice of employers in this sector on skills issues. Lifelong Learning UK provides the strategic perspective for workforce planning and development and influences and shapes relevant policy across the four UK nations. It leads the collection of workforce data and provides analysis on workforce characteristics and trends to better inform future workforce planning.

All Sector Skills Councils produce an annual Sector Skills Assessment (SSA) for the whole of the UK as well as each of the four nations. The SSA builds on Stage 1 of the *Sector Skills Agreement* (LLUK 2007a) and serves as a 'state of the nation report' identifying employer skills needs in the existing and future workforce within the social, economic and political landscapes. It provides employers with intelligence on future skills needs so that skills development can be prioritised for the short, medium and long terms.

The SSA identifies four key elements:

- Drivers of skills demand
- Current skills needs including skills gaps and shortages
- Future skills
- Four nation perspective

Within this context, Lifelong Learning UK has developed the Lifelong Learning Sector Skills Assessment 2010 which:

- Gathers information from across the four UK nations, paying specific attention to geographical differences in the sector and highlighting where specific skills issues are manifest
- Provides a comprehensive overview of current and future skills and drivers of skills demands in Lifelong Learning UK's sectors, namely:
  - Career guidance (CG)
  - Community learning and development (CLD) – which includes the 7 strands of Community based adult learning; Community development; Community education; Development education; Family learning; Working with parents; and Youth work
  - Further education (FE) –within this report, this focuses specifically on FE Colleges
  - Higher education (HE)
  - Libraries, archives and information services (LAIS)
  - Work based learning (WBL)
- Makes practical recommendations, based on the evidence collected, about how the skills priorities within the lifelong learning sector should best be tackled

This document is the Sector Skills Assessment for Wales for 2010 and provides an update to the *Sector Skills Assessment (Wales)* of 2009 (LLUK 2010).



# Section 2: Methodology and Response

To meet the aims and objectives of the Sector Skills Assessment, as guided by the UK Commission for Employment and Skills' (UKCES) Common Labour Market Information (LMI) Framework (UKCES 2009), a mixed methods approach incorporating primary and secondary information analysis was adopted, including the following strands of work:

**Qualitative group discussions and interviews** – Six semi structured group discussions with around 50 participants covering Wales about the drivers of skills and future skills and what employers may be doing in order to deal with future skills issues

**Survey** – a sample survey, based on a proportional allocation of employers in each sector in each nation. The survey, which was hosted on LLUK's website, started in mid June and a data cut was taken in mid September for the purpose of the SSA 2010. However, the survey will remain open throughout the year so that data accumulates. It is LLUK's intention to promote the survey at different parts of the year to garner responses. 100 responses from organisations operating in Wales have been received to date. For the rest of this document, the survey will be referenced as the 2010 SSA survey.

**Secondary analysis**<sup>1</sup> – Literature has been analysed from various sources including policy documents, stakeholder and other government reports, ESTYN reports, research papers written on skills. Data has been reviewed from the most recently available Future Skills Wales survey; Labour Force Survey (ONS 2009), other sectoral datasets such as the Staff Individualised Returns (SIR) in FE colleges in Wales. All national data sources use the 2007 Standard Industrial Classification (SIC) codes, in order to classify "industry sectors". For a detailed explanation of SIC codes, please see Appendix A

**Analysis and interpretation** – All the information from the above mentioned sources has been analysed and interpreted to develop common skills themes in terms of current skills gaps and shortages as well as future skills.

**Survey response** - There were 100 respondents from Wales to the 2010 Survey. 58 per cent of the responding organisation provided community learning and development services; 41 per cent work based learning; 41 per cent library, archive or information services; 22 per cent careers guidance; 21 per cent further education; and 11 per cent higher education. Employers were able to specify multiple services, so there is double counting here.

**Structure of report** - This report sets out findings for Wales, making comparisons with the UK as a whole where appropriate. Section 3 gives the background to the lifelong learning sector and workforce in terms of employment and skills. Sections 4 to 6 present findings for Wales in relation to drivers of skills demand, current skills needs, anticipating what lies ahead, training and workforce development, and priority sectors. Section 7 draws conclusions and sets out skills priorities for the lifelong learning sector in Wales.

Note on qualification levels: This report uses research findings from UK-wide data sources, such as the Labour Force Survey, which use National Vocational Qualifications (NVQ) Levels to categorise qualification level. International sources, such as the Organisation for Economic Co-operation and Development, use Qualification and Credit Framework (QCF) Levels. The levels are defined in the text when comparison is required.

In the current economic and political climate, many policies, headline statistics and trends are changing rapidly. All the information presented in this report is accurate at the time of publication.

<sup>1</sup> Key sources include the employer skills surveys for each nation, although it is important to note that the data from Wales was collected in 2005. Data from Scotland was collected in 2008 and from England and Northern Ireland in 2009

# Section 3: The Lifelong Learning Sector in Wales

## 3.1 An overview of the employment and skills landscape in Wales

According to figures from the Office of National Statistics, Wales provided employment to 1.32 million people aged 16 and over, in 2010 (ONS 2010). The latest figures also report that the population aged 16-64 in Wales had an employment rate of 66.7 per cent during April to June 2010, compared with 70.5 per cent in the UK (WAG 2010a). The 2009 Annual Population Survey reported that the working age employment rate in West Wales and the Valleys was 66.8 per cent whilst that in East Wales was 71.7 per cent (WAG 2009a).

Gross Value Added (GVA) per head, which is a commonly recognized measure of regional economic success and prosperity<sup>2</sup>, was 74.3 in 2008 (index UK=100), and has steadily decreased since 2004.

The Welsh Employment and Skills Board (WESB), which was created in 2008 to advise the Welsh Assembly Government on how skills, employment and business support systems might be improved to meet the needs of individuals and employers in Wales, reports that some of the primary goals of Wales' *Economic Renewal Programme* of 2010 (WAG 2010b) will be to:

- To substantially raise GVA
- To achieve and then exceed the 'One Wales' 80 per cent employment target and, to this end and in the short term, to increase jobs of all kinds
- To ensure sufficient jobs in the right places, including those at the lowest skill levels so as to reduce concentrations of long-term unemployment and economic inactivity
- In the longer term (but beginning straight away), to ensure that all jobs are 'good jobs' of a kind that will prevent recurrent poverty and break the cycle of low skills, economic underperformance and poverty

The WESB highlighted the need to increase GVA by not only increasing engagement in high value sectors but by raising productivity across the economy as a whole. The overarching need is for a skilled and qualified workforce.

In terms of qualifications, the Annual Population Survey (WAG 2010c) in 2009 reported that 14 per cent of working age adults<sup>3</sup> in Wales had no qualifications (down from 14.6 per cent in 2008), 16.3 per cent were qualified to entry/ QCF Level 1 qualifications, 21 per cent were qualified to QCF Level 2 (down from 21.7 per cent in 2008) and 20 per cent were qualified to QCF Level 3 (up from 18.7 per cent in 2008).

When compared internationally, data from the Organisation for Economic Co-operation and Development (OECD 2009) shows that in Wales, 38.0 per cent of the working age population are qualified to intermediate skills levels (QCF Level 2-3)<sup>4</sup>. This is higher than the UK average of 36.5 per cent, which currently ranks 21st in the international skills position out of the 30 OECD countries, ahead of Belgium, Ireland, Australia and New Zealand. For high level skills<sup>5</sup> (QCF Level 4-8), Wales has 30.1 per cent qualified to that level, compared to 31.8 per cent for the whole of UK, making Wales rank ahead of Netherlands, Switzerland and Germany.

<sup>2</sup> GVA is used in the estimation of Gross Domestic Product (GDP), which is a key indicator of the state of the whole economy. In the UK, three theoretical approaches are used to estimate GDP: 'production', 'income' and 'expenditure'. When using the production or income approaches, the contribution to the economy of each individual producer, industry or sector is measured using GVA (ONS website, 2010)

<sup>3</sup> Adult working age is defined as 18-64 for males and 18-59 for females (Statistics for Wales 2010)

<sup>4</sup> Intermediate level skills refer to "upper secondary education" or equivalent identifies a level of attainment (not necessarily reached while the individual was actually participating in secondary education). In the United Kingdom it means attainment of QCF Level 2-3, or a minimum of five GCSEs/SCSEs at grades A\* to C (or an equivalent vocational qualification such as NVQ2), up to A-levels or NVQ3.

<sup>5</sup> High level skills refer to "tertiary-level education" or higher education, which is equivalent to QCF Level 4-8 and includes HND courses and degrees, including bachelor, masters and post-graduate degrees.

Recent research by UKCES (UKCES 2010) on progress across the four nations towards 2020 ambitions for qualifications highlights the *Ambition 2020* targets for Wales in terms of the percentage of the workforce that should be qualified to particular levels, and provides projections based on 2008 progress to determine whether the targets are expected to be met or not.

The following table, which is based on the data from UKCES, suggests that the 2020 target for NVQ Level 2, 3 and 4+ qualifications in Wales, will not be met as there will be a lower proportion of the workforce qualified to those levels than the targets.

For qualifications below NVQ Level 2 and no qualifications, the targets are to reduce the percentage of the workforce at these levels to 6 and 5 per cent respectively. According to the projections, these targets will not be met either, with a higher proportion of the workforce (11 and 7 per cent respectively) remaining at these levels. The table below is a summary of the 2020 targets, projected attainment and resulting gaps as indicated by the UKCES research.

### 2020 Qualification Targets

| Qualification levels (NVQ) | Percentage of workforce at the qualification level in 2008 | Target percentage of workforce to be at the qualification level (based on <i>Ambition 2020</i> ) | Projected attainment of percentage of workforce at the qualification level | Gap                         |
|----------------------------|--|--|--|-----------------------------|
| Level 4+                   | 29%  | Increase to 36%  | 34%  | Below target (by 2% points) |
| Level 3                    | 22%  | Increase to 29%  | 26%  | Below target (by 3% points) |
| Level 2                    | 22%  | Increase to 24%  | 22%  | Below target (by 2% points) |
| Below Level 2              | 15%  | Reduce to 6%   | 11%  | Below target (by 5% points) |
| No qualifications          | 13%  | Reduce to 5%   | 7%   | Below target (by 2% points) |

Source: UKCES 2010

The new Coalition Government has expressed a commitment to World Class Skills and Employment in principle but is reviewing its policy framework and future measures of success, the results of which will be communicated in Autumn 2010 (ibid.)

## 3.2 Lifelong learning sector profile for Wales

The lifelong learning sector provides employment for nearly 1.2 million people in the UK, with approximately 53,000 employers contributing to local economies, as well as meeting the learning and skills needs of millions of people across the UK. In Wales, there are just over 2,600 employers (five per cent of UK total), representing a workforce of just around 97,600 (eight per cent of UK total).

Lifelong learning employers vary by size and sector with 82 per cent employing less than 10 staff; 13 per cent employing between 10 and 49 staff and between 2 and 3 per cent employing over 50 staff. Employers with over 50 staff are mainly in Higher and Further Education, while the other sub-sectors particularly community learning and development tend to be smaller. A detailed sub-sector breakdown of the numbers of employers and employees in the lifelong learning sector in Wales can be found in the tables below.

### Employers in the lifelong learning sector in Wales

| Sector  | Number of employers |
|---|---------------------|
| Career guidance(a)                              | 40                  |
| Community learning and development(b)           | 2,417               |
| Further education(c)                            | 23                  |
| Higher education(d)                             | 11                  |
| Libraries, archives and information services(e) | 54                  |
| Work-based learning(f)                          | 82                  |
| Total(g)  | 2,627               |

Source: ColegauCymru; Universities UK; LLUK archives profile study (LLUK, 2008); Welsh Assembly Government 2010; LLUK and stakeholder estimates.

#### Notes:

(a) Includes six publicly funded agencies providing career guidance and career guidance provision in each university and college based in Wales, so this figure double counts FE and HE. There are also many private sector providers of career development services.

(b) Many CLD organisations will be very small, some only employing one member of paid staff.

(c) Further education colleges and further education institutions.

(d) Universities and higher education institutions.

(e) All library services and archive services in Wales, including those based in universities and colleges, so double counts FE and HE.

(f) Includes 19 FE colleges providing WBL, so double counting part of FE. This figure is likely to be an underestimate of providers across Wales; according to yell.com (visited on 5th October 2010) there are 549 companies listed as training services in Wales.

(g) Total including 223 General Secondary Education employers is 2,850 and excluding the double counting described above 2,558.

Many organisations within the lifelong learning sector are voluntary and information is hard to obtain. Research by the Wales Council for Voluntary Action (WCVA 2009) estimated that there are almost 30,000 voluntary organisations in Wales and up to 30 per cent of these work in the lifelong learning sector. It is difficult to obtain hard evidence or data from this sector for a variety of reasons, not least that around 25 per cent of organisations only employ one member of staff. According to the *Strategic Action Plan for the Voluntary Sector Scheme* (WAG, 2008), the third sector plays a vital role to help deliver the 'One Wales' programme, the vision of which is "a fair and just Wales, in which all citizens are empowered to determine their own lives and to shape the communities in which they live."

## Employees in the lifelong learning sector in Wales

| Sector                                       | Number of employers |
|--|---------------------|
| Career guidance (a)                          | 1,263               |
| Community learning and development (a)       | 56,280              |
| Education support activities (b)             | 1,321               |
| Further education                            | 13,565              |
| Higher education (c)                         | 20,095              |
| Libraries, archives and information services | 2,089               |
| Work based learning                          | 3,000               |
| Total (d)                                    | 97,612              |

Source: ONS Labour Force Survey (four quarter average, 2009); Staff Individualised Record, 2008-09 (Welsh Assembly Government); Higher Education Statistics Agency (HESA) staff record for 2008-09; LLUK archives profile study (LLUK, 2008); LLUK and stakeholder estimates.

### Notes:

(a) Staff in the “Careers advisors and vocational guidance specialists” SOC code who are not covered by a LLUK SIC code have been included in the career guidance estimates.

(b) It is not possible to allocate staff in ‘educational support activities’ to individual sectors within lifelong learning.

(c) The higher education staff figure is rounded to the nearest five.

(d) Including 32,136 General Secondary Education employees, the total will rise to 129,748

The figures above include estimates of the number of volunteers working in the sector. Some subsectors have many volunteers compared to paid staff, notably community learning and development. The Council for Wales of Voluntary Youth Services is the umbrella body for the voluntary youth sector in Wales with a membership of 48 organisations. It is estimated that 40,000 volunteers support work with young people from these member organisations.

Estimates of the number of volunteers in the archives workforce in Wales suggest that six per cent of the workforce is made up of volunteers (LLUK 2008).

Of the 32,448 staff working for the 100 employers that participated in the LLUK employer survey, 55.2 per cent were paid and 44.8 per cent were unpaid/voluntary staff, which reiterates the importance of third sector in Wales.

**Characteristics of the lifelong learning workforce** include gender, ethnicity, diversity and qualifications profiles, as well as working patterns and occupational levels. This information is based on data from Labour Force Survey (ONS 2009) and other sectoral data sources. Please note national data sources are based on:

- Standard Industrial Classification (SIC) codes, which do not fully cover the entire lifelong learning sector, the details of which can be viewed in Appendix A
- Standard Occupational Classification (SOC) codes, the details of which can be viewed in Appendix B

**Gender profile:** Approximately 61 per cent of staff working in the lifelong learning sector across the UK are female and 39 per cent are male. In Wales, the male-female breakdown in most sectors is similar – between 53 and 60 per cent of the workforce are female. The exception is libraries, where 63 per cent are female.

**Age profile:** 50 per cent of the lifelong learning workforce across the UK is aged 45 and above whereas only 26 per cent is below 35. The age profile does not differ considerably amongst the four nations. In Wales, the age profile varies most between sectors. Staff in the youth service are younger than other areas whilst library staff tend to be older.

**Ethnicity profile:** over 90 per cent of the workforce in all sectors and across the lifelong learning sector as a whole is White. Overall, the percentage of staff who are from Black and Minority Ethnic groups varies between sectors, ranging from 4.8 per cent in educational support activities to 8.9 per cent in libraries and archives.

**Disability and learning difficulty:** 15 per cent of the lifelong learning workforce across the UK and 14 per cent in Wales have a disability.

**Working pattern:** Approximately 69 per cent of staff in the lifelong learning sector across the UK work full-time and 31 per cent work part-time. Staff in the adult and community learning, work based learning, and libraries, archives and information services areas are more likely to be working part-time than the sector average for the UK. In Wales, 68 per cent of local authority funded youth service workers work part-time whereas only 17 per cent of the archives and records management workforce work part-time.

**Occupational level:** More than half of the lifelong learning workforce in Wales are professionals, which include lecturers in further and higher education; professional youth workers; librarians and archivists; and training consultants amongst others. Around 16 per cent are in associate professional and technical occupations which include youth and community workers; learning support staff; HE instructors; library and archive assistants, and recruitment officers amongst others. Around 10 per cent each are in administrative/secretarial and personal service roles. The profile is generally similar across the nations.

**Qualifications:** Overall, the lifelong learning workforce is a highly qualified workforce, with 70 per cent of staff qualified to NVQ Level 4 or above. This is similar across the four nations, but the percentage is highest in Wales with 75 per cent of the workforce qualified to level 4 or above. The proportion of staff that have no qualifications in the lifelong learning sector in Wales is two per cent, which is similar to England and lower than the other two nations

Some sector specific data on qualifications show the following results:

- 40 per cent of all further education college staff are qualified to first or further degree level, including professional qualifications (Wales SIR 2007-2008)
- 54 per cent of all higher education staff are qualified to first or further degree level, including professional qualifications (HESA staff record 2007-2008)
- Around a third of youth services staff in Wales are qualified to first or further degree level (Profile of the youth service workforce in Wales data 2008).

### 3.3 Skills demand for the lifelong learning sector in Wales

The 2009 Sector Skills Assessment identified the following skills priorities for Wales:

Skills for **managing change** including keeping pace with emerging technologies, leadership and management of change, planning for and responding to the implications of policy changes for organisations, problem solving skills and creativity.

Skills in **working with others** including partnership and collaboration, engaging with communities, engaging with and understanding the needs and demands of employers - enabling the development of a more demand-led lifelong learning sector, and improved customer service.

General **business skills** including project management, marketing, PR, advocacy, budget planning and financial management, skills relating to innovation and entrepreneurship, bid writing and negotiation skills

**Teaching and learning related skills** including skills in blended learning, skills in sustainable development, innovation and education, skills in teaching priority sector subjects, technician skills, and skills for embedding equality and diversity

#### Key skills

**Welsh language skills**, particularly in bi-lingual Local Authorities and where the local population is looking for a service to be provided through the medium of Welsh

**Employability skills** – particularly amongst the longer term unemployed in areas where traditional industries have declined

The rapid rate of change of the drivers of skills, especially economic drivers, has resulted in a shifting emphasis on skills priorities.

The next section will look at the drivers of change and see how that has impacted the workforce since 2009. It will investigate the effects of these drivers on skills demand as well as analysing employer demand for current and future skills.

# Section 4: What Drives Skills Demand?

The demand for skills is driven by the existing economic, political, social and technological factors. Since the publication of the 2009 Sector Skills Assessment, one of the biggest changes in the lifelong learning sector (and indeed the labour market in general) has been a recession hit economy. Moreover, the Coalition Government in Westminster is implementing its policies for reduced public funding, and there are several unknowns.

However, what is certain is that change is inevitable – in policy, economic climate and society – and all of these will have an impact on the skills demands in the workforce in general, as well as in the lifelong learning sector.

This section undertakes an analysis of political, economic, social, technological and environmental factors to understand how current drivers may affect the lifelong learning workforce.

## 4.1 Economic drivers

The current economic downturn is likely to result in tightening public sector funding and a reduction in private sector profits. This is already evident in various sectors of lifelong learning, with evidence suggesting that the numbers of learners wishing to engage with the sector will continue to increase in the short term, meaning that the sector needs to “do more with less” (BBC 2010).

The latest budget (2010-11) from the Welsh Assembly Government, delivered in 2009, reported that there is a sound basis for continuing to deliver the One Wales agenda - in particular the social partnership approach to help people, communities and businesses through the global economic downturn, and to protect public services. Colleges Wales report that although the budget allocation for colleges has not changed since last year, all staff in the sector had a 2.3 per cent pay rise which cost an additional £6 million with another £6 million from incremental pay rises. This means that in real terms, college staff are required to deliver the same (or greater) volume of learning with a budget reduction of £12 million.

Following the UK's Comprehensive Spending Review, the allocation of budget to Wales has been termed by Welsh Assembly Government as ‘the most challenging since devolution.’ In 2011-12 the total budget will fall by £860m from the budget set for 2011-11 and by 2014-15 the overall budget reduction will be £1.8bn and are in addition to the UK reductions to non-devolved budget lines. The draft budget underlines the Assembly Government's commitment to protecting health, social services, schools and skills – and provides vital help for the most vulnerable people in our society; support for children and older people; and a boost for our fragile economic recovery. The budget allocated to Children Education, Lifelong Learning and Skills reflects the positive commitment to protect funding for schools and skills, and to protect those front line services which impact directly on children. Looking forward over the next three years, the Department for Children, Education, Lifelong Learning and Skills (DCELLS) will see an increase in its baseline revenue funding of £10.8m. However next year there is a reduction of £21.1m and 2012-13 it will increase by £8.6m and then by £23.3m in 2013-14. Capital funding will be reduced each year for the next 3 years. Social Justice and Local Government's overall revenue budget allocation will reduce by £24.4m by the financial year 2013-14. Again, the budget allocation to Heritage (Libraries, Archives and Information Services) will reduce by 4.2m by 2013-14. As yet the exact detail of the impact of these reductions is not fully in the public domain, and we will need to monitor this closely over the coming months.

Job losses appear inevitable across the public sector. Local government in Wales has already announced between 3,000 and 4,000 job losses over the next three to five years. This is a particular issue in Wales given that a greater proportion of Wales' working population works directly for one of the public services (26.6 per cent) compared to the UK average of 21.1 per cent (WLGA 2010).



## 4.2 Political drivers

The process of devolution of powers to the Welsh Assembly Government commenced with the first Government of Wales Act 1998. From then onwards, policy decisions relating to the Lifelong Learning sector have been a matter for the Welsh Assembly Government. The Government of Wales Act has regularly been extended since this date.

The policies that impact upon employers within the lifelong learning sector in Wales arise from a variety of Welsh Assembly Government departments:

- Pan Welsh Assembly Government policies (which set the overall tone for the development of divisional policy in Wales)
- Department for Children, Education, Lifelong Learning and Skills (Further Education; Higher Education; Work based Learning; Adult Community Learning; Youth Work; Working with Parents; Family Learning; Development Education; Career Guidance)
- Department for Rural Affairs and Heritage (Libraries, Archives and Information Services)
- Department for Social Justice and Local Government. (Community Development)
- In addition to the DCELLS policies for Higher Education, the environment for HE is also shaped by the Higher Education Funding Council's for Wales remit letter for HE.

In addition to formal policies, the lifelong learning sector is also influenced by Ministerial speeches and Independent Reviews which shape policy in years to come.

The Welsh Assembly Government is currently a coalition government between the Labour Party and Plaid Cymru following the general election in June 2007.

The key political drivers of change for workforce skills are explored in detail below, with reference to the lifelong learning sector in Wales and individual sectors within lifelong learning, where relevant.

### **Policies relating to collaborative working:**

The current and ongoing reduction in public funding and reduced profits in the private sector are leading to examples of different institutions working in partnership across the lifelong learning sector. This practice is also being encouraged by various policy documents in Wales.

Guidance for the *Submission of Regional Strategies for the Planning and Delivery of Higher Education* (WAG 2010d), which referenced another document, *For our Future* (WAG 2009b), included the expectation that the Welsh Assembly Government, working with stakeholders and Higher Education Funding Council for Wales (HEFCW), would 'develop a regional dimension to planning and delivery of higher education'. It noted the need for HEFCW to 'explore, develop and co-ordinate, in concert with the HE community, the development of a regional planning and delivery structure in Wales which can identify and tackle need while demonstrating the best use of resources'.

HE and FE providers in three regions of Wales (North and Mid Wales; South East Wales; South West Wales) were asked to put in joint proposals for collaborative working on learning, teaching, back office functions and capital development to reduce local competition, create 'critical mass' and better meet regional need whilst reducing cost.

*Skills that works for Wales* (WAG 2008a) - This document is a new skills and employment strategy and action plan that builds upon and replaces the Skills and Employment Action Plan 2005. The strategy provides a response to the *Leitch Review of Skills in the UK* and the independent review of the mission and purpose of further education (Promise and Performance). The strategy and action plan include: new approaches to funding; a more demand responsive skills and business support service; integrated skills and employment services delivered through partnership between the Assembly Government and Department of Work and Pensions; and the transformation of the learning network. This document was produced prior to the recession and is currently being reviewed.

*Transforming education and training provision in Wales* (WAG 2008b) challenges the lifelong learning sector in Wales to work together to transform the network of providers to: widen options available for students at 14-19 in a way that prepares young people for all pathways and respects different learning styles of students; reduce unnecessary duplication of provision by increased collaborative curriculum planning and delivery; and raise the quality of institutional management and of students' learning experience.

Lifelong learning sector providers need to ensure that the skills of their own workforce are excellent in the following areas:

- guidance for young people on the full range of pathways open to them
- embedding equality and diversity in practice
- increased collaborative working on curriculum planning and delivery
- raising the quality of institutional management
- improving students' learning experience

*Getting on together - a community cohesion strategy for Wales* (WAG 2009c) is a strategy to support service providers such as local authorities and their partners to develop a strategic approach to promoting and maintaining cohesion in their local areas. Community cohesion as a strategic aim can only be achieved through practical support across a broad range of policy and service delivery. The Strategy specifically mentions "Learning" as a service delivery area that can have a significant impact on how well a community gets on together. The Strategy emphasises the value of local partnerships, the important role of organisations that are working at community level and readily acknowledges that the engagement of people living in communities is vital.

The action plan that accompanies the strategy includes many example of how providers will be required to work in partnership with multiple agencies, ensuring that all activities are accessible, sensitive to cultural differences and promote equality and diversity.

*Archives for the 21st Century* (WAG 2009d) sets out the key recommendations of the assembly government to ensure that archives in Wales continue to support the cultural heritage of Wales and that that all Welsh archive services are empowered to realise their full potential in the increasingly digital 21st Century.

A key recommendation of the report is 'Together, bigger, better', which promotes the significant value in moving towards a collaborative culture for archive services. Offering greater efficiency and effectiveness through innovative partnerships within or between funding authorities will allow scope for improvements in the quality of services provided. The report also suggests that cross-sector collaborations between local authorities,

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universities, the NHS or other public sector partners should be explored. Robust joint arrangements would be vital to this approach, to allow any partnership to fulfil its potential. The exploration of closer cooperation between archive services and with libraries, museums and other information services would also create new opportunities to develop more innovative services.

### **Policies relating to building communities:**

Two policies in particular highlight the Welsh Assembly Government's commitment to improving communities in Wales. Both have significant implications for community learning and development providers, but also with other learning providers who wish to engage with communities as part of the collaborative working requirements described above.

*Working with Communities - the first Community Development Workforce Action Plan for Wales (WAG 2010e)* considers and sets out the actions necessary to ensure that the community development workforce in Wales is highly skilled and qualified for the benefit of the communities in which they live and work. The relative shortage of people in Wales with community development training and experience has meant that not all staff employed had the full range of experiences or formal qualifications which might be wished for. Communities First staff, especially co-ordinators and development workers, require a range of skills including personal, organisational and theoretical. Academic training can be invaluable to this work.

*Getting on Together - a Community Cohesion Strategy for Wales (WAG 2009e)* is part of the Welsh Assembly Government's One Wales commitment to achieve a fair and just society, a place where all citizens are empowered to determine their own lives and shape the communities in which they live.

### **Policies relating to new ways of delivering learning, guidance or information:**

The way that learning providers are delivering learning is changing constantly, especially with the emergence of new technology, but also with new qualifications, as described in *For our Future (WAG 2009c)*, which includes recommendations that universities in Wales find ways for students to experience HE, including part-time and in the workplace, through Foundation degrees, and apprenticeships among others. The document also mentions that part-time and work-based students should be able to gradually build up smaller units of credit towards a qualification.

For the career guidance staff of Careers Wales, the Welsh Assembly recently published *Careers Wales: A Review in an International Perspective (WAG 2009f)* which stresses the need to pay more attention to the needs of adults. Although Careers Wales is all-age in the range of its services, only about 15 per cent of its resources are currently allocated to support for adult clients. This low allocation is now being questioned from three perspectives: the broad skills agenda; the impact of welfare reform; and the likely massive growth of redundancies. Each of the three has potentially huge implications for demands on Careers Wales resources.

Libraries and Archives must also continually evolve in the way they present information to customers. The implications of this are explored in *Libraries for Life: Delivering a Modern Library Service for Wales (WAG 2008c)* and in *Archives for the 21st Century (WAG 2009d)*, which include:

- Implementation of the next phase of the national marketing strategy for libraries
- Collecting feedback, and analysing performance and trends to inform future work -

- Co-ordinated response to the growing challenge of managing digital information so that it is accessible now and remains discoverable in the future
- Comprehensive online access for archive discovery through catalogues and to digitised archive content by citizens at a time and place that suits them
- Active participation in cultural and learning partnerships promoting a sense of identity and place within the community

New ways of learning delivery will create a demand for new skills in staff, which will include digital preservation and electronic records management; online customer engagement; marketing and communications among others.

### **Policies relating to supporting young people into lifelong learning:**

In order to improve the productivity of the workforce in Wales, the Welsh assembly Government is particularly concerned with individuals who are not in employment, education or training (NEET). Reducing the proportion of young people not in education, employment or training in Wales (WAG 2009g) talks about having effective learning support and careers advice and guidance are in place so that young people are given the knowledge and skills to access appropriate education, training or employment. It is likely that most career guidance providers already have and utilise the skills required to deliver guidance, but the NEET group and the specific challenges faced by this diverse range of users may have other skills implications for the workforce, namely, equality and diversity, dealing with challenging users, social inclusion issues.

The *National Youth Service Strategy for Wales* (WAG 2007a) sets out a series of goals for local authority providers, third sector providers and further education. These included developing partnerships, engaging with learners (young people), improving delivery, and implementing evidence gathering standards. Most of the skills needs implied by the action plan should already be in place, however, the time line for implementation was up to 2011, so some issues may still need to be addressed.

*Youth Support Services 11-25 and Learner Support Services 14-19* (WAG 2010f), which is a refresh of *Extending Entitlement 2002* will clarify the requirements on local authorities relating to the type of support and opportunities young people should expect.

### **Policies relating to basic skills provision:**

The Welsh Assembly Government's strategy for raising standards of literacy and numeracy in Wales, *Words Talk - Numbers Count* (WAG 2005) is the Assembly's second Basic Skills Strategy. It takes forward the agenda set in *The Learning Country* and has the same fundamental aims as the first Strategy.

These are:

- all young children should be prepared for learning when they begin school;
- the number of children leaving primary school struggling over reading, writing and the use of number should be further reduced;
- fewer young people should leave compulsory education still struggling with basic skills; and

- the number of adults with poor basic skills should be diminished significantly
- This second Basic Skills Strategy includes a number of important new features, including an all-age approach that concentrates on ten horizontal themes and ten priority groups.

Although it is likely that most providers already have and utilise the skills required to deliver basic skills learning, the refreshed strategy may have other skills implications for the lifelong learning workforce.

The *Learning Country: Vision into Action* (WAG 2010g) - Originally written in 2001, as a 10 year strategy, this has been the primary strategy for the Department for Education, Children, Lifelong Learning and Skills. It highlights the increased education and training opportunities available in Wales from early years through to old age.

### 4.3. Social drivers

One of the most important social drivers in Wales is the demand to create a Bilingual Wales. In the last ten years, there has been a rise of Welsh medium schools and general statistics for Wales show that in January 2009, 99.8 per cent of pupils in maintained primary schools were taught Welsh as either a first or second language (Statistics for Wales 2009), thereby indicating a rise in the demand for Welsh language skills.

According to the Welsh Language Use Survey, 21.7 per cent of the general population of Wales are Welsh speakers (WLB 2006), with North Wales and South West / Mid Wales having the largest concentration of

## Case Study - Wales

Skills Need: Competency Framework

Organisation: Glamorgan Records Office

When relocating to its new purpose-built facility, the Glamorgan Records Office carried out a Job Evaluation process as part of its change in governance structure.

The evaluation process found that the existing competency framework had been in place for ten years and didn't reflect the work staff would be doing in the new facility.

Staff collect and catalogue records relating to the history of Glamorgan and its people to save them for future generations. These records can include papers, plans, photographs, parchments, personal diaries and council minutes that may be in danger of destruction or decay. Staff ensure that items are held in the best environmental conditions and are packaged in appropriate materials. Staff offer advice on making the best use of records, give talks to visiting groups and mount exhibitions using unique documents in displays and exhibitions and produce DVDs of talks on popular subjects.

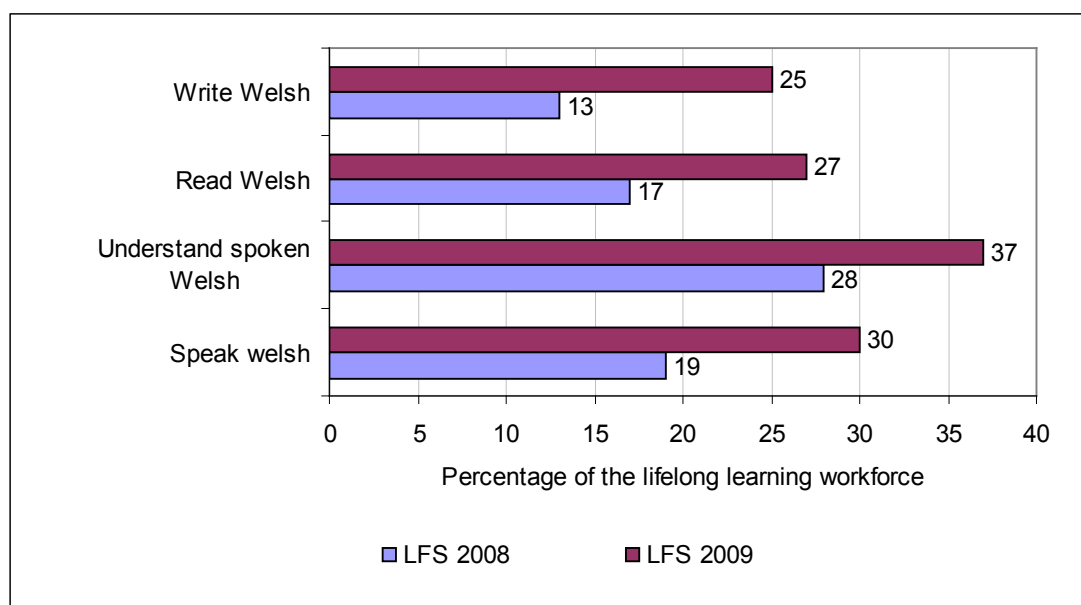
The National Occupational Standards (NOS) for Information & Library Services, Archive Services and Records Management and the user guide provided a useful framework to review and update the competency framework. Staff now have a clear idea of the expectations for their job role. Training needs are identified and the quality of service will improve because interventions for staff will be based on what they do. The Glamorgan Records Office is sharing their experience with the Welsh Records Office Network to allow others to benefit from their approach to workforce development.

Susan Edwards, Glamorgan Archivist, is very pleased with the outcome from this work. *"The NOS and NOS user guide developed by Lifelong Learning UK have provided a much more comprehensive, clear and practical method to develop our existing staff competency framework. We now have a focused approach to identifying staff development needs that will serve us well for years to come."*



people with Welsh language skills. The Lifelong Learning UK *Welsh language skills audit* (LLUK 2007) showed that lifelong learning staff in these areas were far more likely to have Welsh language skills than in other locations. More recent data from the Labour Force Survey (ONS 2009) on the specific Welsh language skills of the lifelong learning workforce are shown below:

### Percentage of the lifelong learning workforce with Welsh language skills:



Sources: Labour Force Survey (ONS 2009)

NOTE: The LFS 2009 is based on SIC 2007 while the LFS 2008 is based on SIC 2003. There is an apparent marked increase in Welsh language skills in the last year, although it is impossible to know whether this is due to the SIC recode, or is a genuine change in the workforce.

According to sector specific data on Welsh language skills show that:

Seven per cent of higher education academic staff (HESA data 2009) nine per cent of further education college teaching staff (SIR data 2010) are able to deliver learning in the medium of Welsh. For FE colleges, this is a two per cent increase from the previous year.

Sixty employers employing 12,376 paid staff answered the Welsh language section of the LLUK employer survey. They stated that 5.1 per cent and 3.7 per cent of their paid staff were providing learning delivery and other services respectively through the medium of Welsh or bilingually. It was also reported that 2.3 per cent of paid staff were able to provide learning delivery and 2.4 per cent of paid staff were able to provide other services through these mediums but were not currently doing so.

The main reasons for providing learning delivery or other services through Welsh, cited by employers in LLUK's *Welsh Language Skills Audit*, were legislation (36 per cent) and market pressures (22 per cent).

There is a strong will to ensure equal treatment of the Welsh language in Wales. Various policies and measures contribute to this:

*Iaith Pawb* (WAG 2003), which is currently being reviewed, stated that the Welsh language is an integral part of

Wales' national identity. The measures and strategies intended to deliver *laith Pawb* are outlined below.

The *Proposed Welsh Language Measure* (National Assembly for Wales website 2010) was published by the Minister for Heritage with the aim to provide greater clarity and consistency for Welsh speakers about the services they can expect to receive in Welsh.

A key commitment of the Welsh Assembly Government's One Wales programme of government was to seek 'enhanced legislative competence on the Welsh language in order to legislate by Measure to: confirm official status for both Welsh and English; linguistic rights in the provision of services; and, the establishment of the post of Language Commissioner'.

The proposed Measure is intended to modernise the existing legal framework regarding the use of the Welsh language in the delivery of public services. In doing so, it meets the commitments made in the One Wales document and will likely result in an increase in the Welsh language skills of the population as a whole.

*Welsh-medium Education Strategy* (WAG 2010h) - The Welsh Assembly want to ensure that Wales' education system makes it possible for more learners of all ages to acquire a wider range of language skills in Welsh, a system which is responsive to public demand for an increase in Welsh-medium provision.

- Outcome 4: More learners aged 16–19 studying subjects through the medium of Welsh, in schools, colleges and work-based learning
- Outcome 5: More learners with higher-level Welsh-language skills

These measures will result in an increase in the Welsh language skills of the population as a whole, leading inevitably to an increase in demand for services in Welsh, including lifelong learning. This demand will have an impact on the skills needs of the lifelong learning workforce. The impact of this of specific sectors of lifelong learning is discussed below:

Details on the impact of increasingly bilingual Wales on further education is provided in *Colleges Wales' National Strategy on Bilingualism* (College Wales 2010). Implementation of *Colleges Wales' strategy* will have significant implications for the requirement of Welsh language skills among college staff and Welsh language learning provision and learning support by college staff.

Careers Wales has recently refreshed their Welsh language scheme stating that "language is a crucial part of a person's identity;... and that the public can better express their comments and needs in their preferred language and that allowing people to use their preferred language whilst receiving or contacting services is a matter of good practice as opposed to tolerance".

Libraries and archives under the Local Authorities also recognise the equal status of the Welsh language. Access to services through the Welsh Language is set out in the schemes similar to those described above. In addition, library services in Wales have an obligation to promote the Welsh language and culture.

Individual higher education institutions all have their own individual Welsh Language Schemes. In order to develop the overall capacity of Welsh language provision in higher education the One Wales agreement proposed a Welsh-medium Higher Education Network. This led to the establishment of the Federal College or *Coleg Ffederal* in 2009. The College is an independent legal entity that works with and through the existing higher education institutions in Wales to maintain, develop and oversee Welsh medium provision within higher education institutions in Wales.

## 4.4 Technological drivers

With new electronic technologies being introduced regularly, the workforce will need relevant skills to use digital technology effectively in order to help deliver creative and inspiring learning experiences. The workforce will need to be agile to adapt and learn how to use digital learning resources and platforms (e.g. websites, online seminars; virtual learning environments) in order to deliver e-learning, distance learning and blended learning in a way that engages and stimulates learners from diverse backgrounds. It is not possible to specify exactly what makes a ‘good quality’ learning resource, because so much depends on the “type of the resource (tutorial, simulation, game, podcast, video, presentation, text document, etc.); the purpose of the resource; the way in which the resource is used, and the characteristics of the particular users.” (elearning network website, 2010).

There are various policies in Wales that talk about the technological drivers of skills demand in the lifelong learning sector, some of which include:

- *Cymru Ar-lein: Online for a Better Wales* sets out the Welsh Assembly Government’s vision for the role Information Communication Technology plays in transforming society and the economy in Wales.
- The *Libraries for Life programme* (WAG 2008c) speaks of further improvements to Information and Communication Technologies provision including free broadband access, free online services providing quality content and initiating new services such as Wireless Fidelity (Wi-Fi) facilities
- *Archives for the 21st Century* (WAG 2009d) recommends for a co-ordinated response to the growing challenge of managing digital information so that it is accessible now and remains discoverable in the future and a comprehensive online access for archive discovery through catalogues and to digitised archive content by citizens at a time and place that suits them.

## 4.5 Environmental drivers

The *Climate Change Strategy* (WAG 2010i) sets out the targets of emission reduction. The assembly expects every part of the public sector in Wales to be working towards three per cent annual reductions in greenhouse gas emissions. This is in line with the target of three per cent annual reductions across all areas of devolved competence. Lifelong learning employers may have to change the way that they operate to meet these targets.

The Education for Sustainable Development and Global Citizenship agenda (ESDGC website 2010) which enables people to develop the knowledge, values and skills to participate in decisions that will improve the quality of life now without damaging the planet for the future. The Strategy for Action challenges staff from across lifelong learning to play a crucial role in supporting the transition to sustainable development and global citizenship, by guiding institutions’ strategic planning, managing major capital programmes and leading the sector’s interactions with external partners and stakeholders. Lifelong learning sector managers and leaders can raise the status of ESDGC within their institutions or remit, and work to embed the principles of sustainable development into all learning delivery.



## 4.6 Conclusions

There are various patterns emerging from the drivers mentioned above. As public funding faces significant current and ongoing reductions, there will be the need for more efficient use of resources, both material and human. More will have to be produced, by effective collaborative working both within the lifelong learning sector (including the third sector providers within the sector) and with other agencies across all sectors in Wales to take advantages of economies of scale. It is likely that this will involve the introduction of new ways of delivering learning and information such as efficient digital technology and new/social media. The above requires strategic leadership skills to ensure that changes are managed well.

It is vital that front line services in the lifelong learning sector are maintained through the current economic situation. Providers will have to be responsive to the demands of learners, but also engage with employers and communities to ensure that their provision is fit-for-purpose and meeting demand.

It is also likely that the lifelong learning sector will play a vital role in future economic recovery. Supporting young people into lifelong learning, providing suitable career guidance (for adults as well as young people), building community cohesion and improving the basic skills (literacy, numeracy and basic ICT skills) of the general population of Wales are paramount.

All of these activities must be available in both English and Welsh.

In summary, the drivers mentioned above will create a demand, in general terms, for the following skills:

- Partnership and collaborative working
- Greater employer engagement and involvement
- Strategic leadership
- Management of change
- Basic skills provision
- Welsh language skills, with particular reference to learning and information delivery
- Transferable skills

# Section 5: Current Skills Needs

This section will cover skills shortages and gaps in the lifelong learning workforce as stated by employers and defined through data from various sources. As proposed in the *Common LMI Framework* (UKCES 2009), data from latest available Future Skills Wales (FSW) survey is used to report in skills shortage vacancies and skills gaps as viewed by employers in the lifelong learning sector. This survey was last undertaken in 2005. In the absence of any other definitive data source for Wales, the data is used in this report but must be viewed in that context. FSW classifies the lifelong learning sector using SIC codes, which do not cover the totality of LLUK's sectors; and in some cases have incomplete data. (Please refer to Section 2 – Methodology – for more details).

Data is also used from other sources including LLUK's online 2010 SSA survey to obtain richer details in terms of skills shortages and gaps.

## 5.1. Recruitment and skills shortages

### DEFINITIONS:

**Hard-to-fill vacancy** - Those vacancies classified by respondents as hard-to-fill

**Skills shortage vacancy** - A subset of hard-to-fill vacancies where the reason given for the difficulty filling the position is a low number of applicants with the required skills, work experience or qualifications

**Skills gap** - This exists when the employer indicates that staff at the establishment are not fully proficient at their jobs.

### Vacancies

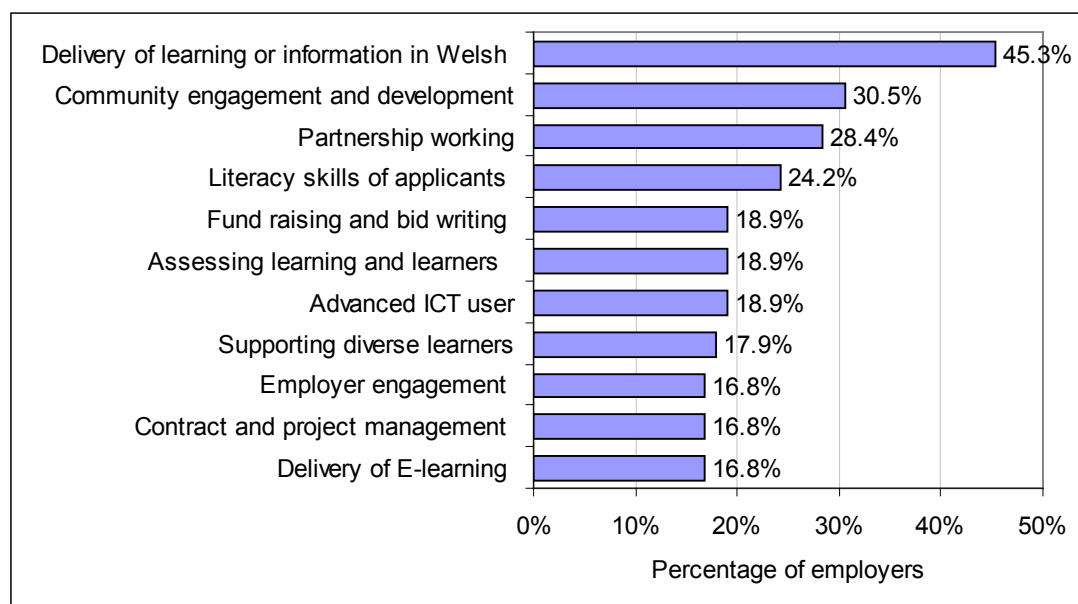
24 per cent of lifelong learning employers and 21 per cent of all employers in Wales reported vacancies. Although proportionately more employers in the lifelong learning sector report vacancies, vacancies as a proportion of staff employed is more than double that across all sectors – 1.6 per cent in the lifelong learning sector and 3.5 per cent in all sectors. The 2010 SSA survey found a similar figure of 1.3 per cent.

### Hard-to-fill vacancies

Even though more employers report vacancies in the lifelong learning sector, less are likely to report hard-to-fill vacancies (6 per cent) than the all sector average (10 per cent). In the lifelong learning sector, this translates to 23 per cent of all those with any vacancies. There are reportedly three times as many hard-to-fill vacancies across all sectors in Wales (1.2 per cent) than in the lifelong learning sector in Wales (0.4 per cent). The main reasons for hard-to-fill vacancies identified by 2010 SSA survey respondents were: low number of applicants with the required skills; lack of qualifications the company demands; and low number of applicants with the required attitude, motivation or personality.

Employers in the lifelong learning sector that participated in the 2010 SSA survey were asked about skills shortages. According to their responses, the top skills shortages, the foremost of which is delivery of learning and information in Welsh, are highlighted in the diagram below:

## Skills Shortages



Source: 2010 SSA survey. Base 95 employers

Specific skills shortages that have been identified through literature review and primary sources include:

**Basic skills provision:** Employers in further education, adult community learning and work based learning report that it is difficult to recruit basic skills tutors, ESOL tutors and Welsh Medium/ Bilingual tutors. Estyn notes that over half of ESOL providers report difficulties in recruiting suitably qualified staff. There are also limited opportunities for existing staff to gain specialist ESOL teaching qualifications.

**Basic skills of applicants:** the 2010 SSA survey found literacy skills of applicants were more of an issue for employers than numeracy (14.7 per cent, ranked 13) and ESOL (8.4 per cent, ranked 25) skills.

**Soft skills:** Employers in career guidance in Wales are experiencing difficulty in recruiting staff with 'soft' skills such as responsibility/autonomy and time management skills/ability to prioritise.

**Welsh language skills:** delivery of learning or information in Welsh was identified as a skill lacking amongst applicants by 45.3 per cent of employers that responded to the 2010 SSA survey, which was more than any other skills area. A relatively large proportion of career guidance employers in Wales, along with employers from higher and further education, report problems recruiting Welsh speakers.

Community engagement and development, partnership working and employer engagement were in the top ten skills shortages reported through the 2010 SSA survey by employers operating in Wales.

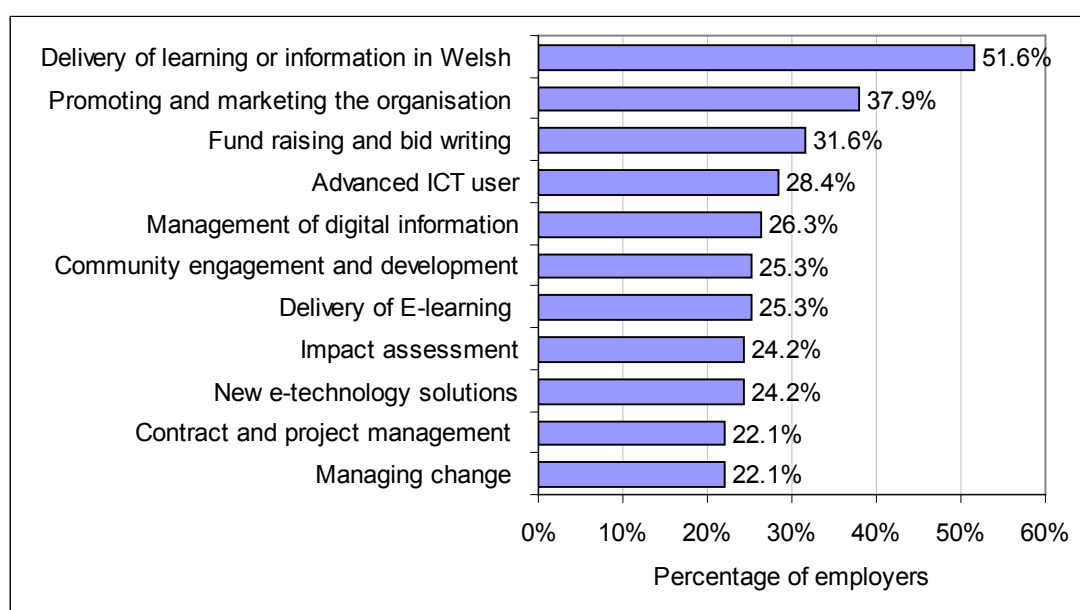
**Advanced ICT skills and delivery of e-learning** were also amongst the top ten skills shortages.

Four per cent of all employers in the lifelong learning sector and across all sectors have skills shortage vacancies, which equates to 15 per cent of all those with vacancies (Future Skills Wales 2005).

## 5.2 Skills gaps

Employers in the lifelong learning sector that participated in the 2010 SSA survey were asked about skills gaps. The figure below shows the top skills gaps as identified by employers. Similar to the skills shortages, delivery of learning and information in Welsh ranks as the top most skills gap among employers of lifelong learning in Wales.

### Skills Gaps



Source: 2010 SSA survey. Base 95 employers

Other specific skills gaps that have been identified through literature review and primary sources include:

**Collaborative working:** For example, Estyn found that providers of adult community learning did not always work well enough together to implement a strategy for basic skills in an area. Another example is within the 14-19 policy: Post-16 education providers are required to work in partnership with schools and the learners may be working in either establishment. Some employers report skills gaps in 14-19 learning provision and support staff around the management of this situation, given the different learning environments of the two systems.

**Use of new technologies:** Estyn recommends that ESOL providers should extend the use of computer-based learning in order to reach out to and retain more learners. Employers in further education also report skills gaps with regard to using technology to support learning. Advanced ICT skills, management of digital information including web content, delivery of e-learning and use of new e-technology solutions (e.g. twitter, social networking, learning hubs) were four of the top ten skills gaps reported by employers that responded to the 2010 SSA survey – each selected by around a quarter of employers. On a related note, general IT user skills was the highest reported skills gap in the lifelong learning sector in the Future Skills Wales survey (2005), with 58 per cent of lifelong learning employers citing it, compared with 40 per cent across all sectors in Wales.

Strategic leadership: Estyn reports that

- many community learning and development managers do not use strategic documents and curriculum plans well enough as strategic planning tools
- there is a general lack of strategic planning for the effective use of learning resources in work based learning
- in most regions, the principal youth officers' group does not give enough strategic direction to their training officers' group to enable them to develop coherent and effective youth service training across their region
- Strategic leadership and planning was reported as a skills gap by 14 employers (14.7 per cent, ranked 17) that responded to the LLUK survey.

**Promoting and marketing the organisation, fund raising and bid writing, and managing change** were amongst the top ten skills gaps found through the 2010 SSA survey.

**Evaluating impact.** Impact assessment was also one of the top ten skills gaps, identified by almost a quarter of respondents to the 2010 SSA survey. Estyn reports that among youth services there was often only limited evaluation of how effective the services were in meeting young people's needs. In times of increasing economic hardship, it will become even more important to justify funding by reporting the impact of any activity.

According to data from Future Skills Wales (2005), generic skills were most commonly reported to be lacking amongst staff:

- team working skills (48 per cent)
- problem solving skills (47 per cent)
- customer handling skills (44 per cent)

33 per cent of lifelong learning employers who report having skills gaps cite "Welsh language skills" as an issue, compared to 23 per cent across all sectors in Wales (Future Skills Wales 2005). Just over a third of employers that took part in the 2010 SSA survey reported being dissatisfied or very dissatisfied with the Welsh language or bilingual skills of existing staff. This suggests that there is a need to train existing staff (who may already have Welsh language skills) in Welsh or bilingual learning delivery. Teaching staff with Welsh language skills confirmed the need for training or support for Welsh or bilingual learning delivery (Welsh Language Skills Audit, LLUK 2007). Delivery of learning or information in Welsh was reported by more employers (51.6 per cent) as a skill lacking amongst existing staff in the 2010 SSA survey than any other skills gap.

Apart from general IT user skills, IT professional skills and Welsh language skills are identified as bigger issues in the lifelong learning sector than across all sectors (Future Skills Wales 2005). This is somewhat consistent with the 2010 SSA survey, where Advanced ICT user skills and delivery of learning or information in Welsh is amongst the most reported skills gaps, however basic ICT skills is not ranked highly (9.4 per cent, ranked 24).

According to the 2010 SSA survey, skills gaps were a result of inability of staff to keep up with change (34.0 per cent) and a lack of experience (31.9 per cent) more than anything else. However, other reasons such as insufficient training and development (24.5 per cent), insufficient staff motivation (21.3 per cent), and lack of required qualifications (20.2 per cent) were also given.

### 5.3. Training provision in the lifelong learning sector

The 2010 SSA survey found that 85 per cent of employers in Wales had funded or arranged off-the-job training in the 12 months prior to the survey. The equivalent figure for the lifelong learning sector was almost identical at 84 per cent. The main barriers to providing training or development opportunities to staff were that employers could not spare staff time and a lack of funding.

68 per cent of managers and senior officials, 55 per cent of professionals and 48 per cent of administrative/secretarial staff received off-the-job training in the lifelong learning sector in Wales. The equivalent figures for these occupational groups are 65 per cent, 25 per cent and 35 per cent across all sectors. The largest difference, of 30 percentage points, is observed between professionals receiving training in the lifelong learning sector and all sectors in Wales. Some differences are also apparent for staff in skilled trades and administrative/secretarial roles.

#### Off-the-job training by occupation in Wales

|  | Lifelong Learning sector | All Wales |
|--|--------------------------|-----------|
| Managerial occupations                 | 68                       | 65        |
| Professionals                          | 55                       | 25        |
| Associate professionals                | 15                       | 15        |
| Administrative/secretarial occupations | 48                       | 35        |
| Skilled trades                         | 6                        | 19        |
| Personal service occupations           | 11                       | 12        |
| Sales/customer service                 | 16                       | 22        |
| Transport/machine operatives           | 1                        | 9         |
| Elementary occupations                 | 11                       | 17        |

Source: Future Skills Wales 2005

Of lifelong learning employers, 37 per cent reported that their off-the-job training was mainly non-statutory (33 per cent in all sectors) whereas 9 per cent provided mainly statutory training (23 per cent in all sectors). However, 52 per cent of employers provided both types evenly (42 per cent across all sectors).

37 per cent of the lifelong learning workforce in Wales had received training at work in the last three months before the Labour Force Survey (ONS 2009).

# Section 6: Anticipating What Lies Ahead

## 6.1 Future skills

Accurately predicting the skills demands of the future is always difficult. It is even more challenging during times of great and rapid change. Many employers will plan for the short to medium term, but the assembly government needs to plan in the longer term. Lifelong Learning UK has gathered intelligence from employers, stakeholders and the assembly government to predict the emerging future skills needs, and the landscape in which lifelong learning providers will have to operate.

Current skills needs that are likely to continue as future skills needs include:

- Basic skills and ILT skills
- Welsh language skills

Future changes that are anticipated by the lifelong learning sector in Wales include:

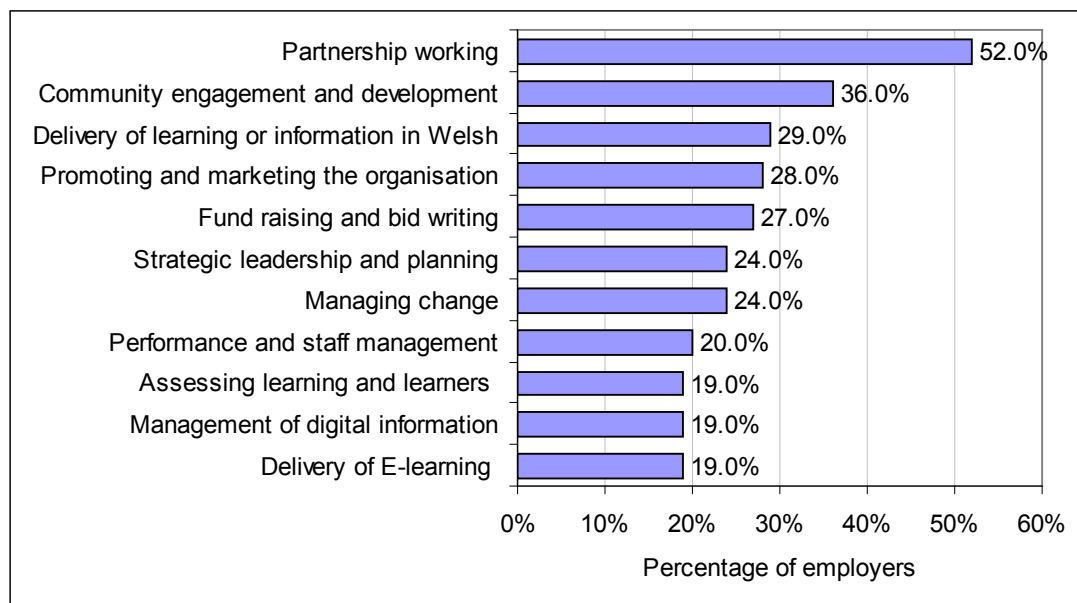
- Managing change – this is a key skill that will be required to cope with the ongoing challenging economic situation
- Responding to the learner voice – customer service philosophy will become more critical as learners are required to pay more fees
- Commissioning skills – specifying and obtaining the correct service is a vital skill, especially when drawing on reduced public funding
- Learning coaching skills – it is anticipated that the role of learning coach will increase
- Digitisation – increasingly an issue affecting how information is stored or passed on
- Social networks for delivery of learning – this is not just an issue around the delivery skills but also the changes required within institutions to facilitate these forms of learning
- Employers will need to be able to use staff more flexibly, to fully utilise their skills.

The future is likely to hold many challenges for the sector, including:

- The existing workforce being expected to work for longer (brought about by the increase in retirement age)
- Career paths across the sector may be at risk in light of public sector cuts
- Limited investment ability may reduce the ability to keep up to date with technological change (due to the capital investment requirements)

The figure below shows the top future skills needs as identified by employers:

### Future Skills



Source: 2010 SSA survey. Base 100 employers.

The following skills were identified from the literature review and primary research as being essential requirements in the future:

**Collaborative working skills:** Given the reduction of public funding and the need to reap economies of scale and make use of resources efficiently, collaborative working is an essential way forward. In order to achieve this, there will be need for skills of partnership working with multiple organisations. Skills such as partnership working and community engagement and development were the top two future skills needs identified by employers (2010 SSA survey). For example, in career guidance there is a need for cohesion between agencies; for example there needs to be a more effective transfer of information and knowledge from youth-orientated to adult-orientated services. In addition, sixteen per cent of employers reported employer engagement to be a future skills issue.

**Use of new technology for information management and delivery:** delivery of e-learning and management of digital information were also amongst the top ten future skills issues identified by employers in the 2010 SSA survey. For example, Estyn recommends that local authority youth services should develop effective management information systems to collect data on take up, attainment, drop-out rates and progress of young people in formal and non-formal education.

**Fund raising and bid writing skills.** As funding continues to dwindle, there is a need to be better at applying for funding, both in maintaining existing sources or securing new sources. Of the 2010 SSA survey respondents, 27 per cent reported fund raising and bid writing to be future skills need. Employers in community learning and development currently report that this process is currently a little “hit-and-miss”.



Promoting and marketing the organisation was considered by 28 per cent of employers as an important future skills need (2010 SSA survey)

**Management skills:** specific management skills will be particularly required by staff in the lifelong learning in Wales, including

- managing change
- strategic leadership and planning
- performance and staff management

**Delivery of learning and information in Welsh** will continue to be a skills need of the sector in the future but it is expected to be less of an issue than now.

As shown in the table below, a large majority of employers stated that they were planning to continuously update staff skills to deal with future skills issues and a majority also intend to provide CPD to staff based on training needs analysis and training plan (2010 SSA survey).

### Solutions to future skills requirements

|  | Number of employers | Per cent |
|--|---------------------|----------|
| Continuously update staff skills   | 73                  | 73.0%    |
| Provide CPD to staff based on training needs analysis and training plans                     | 57                  | 57.0%    |
| Keep up-to-date with and respond to new legislative and regulatory requirements              | 42                  | 42.0%    |
| Continuously update staff skills related to new technology                                   | 36                  | 36.0%    |
| Make decisions based on local intelligence   | 29                  | 29.0%    |
| Introduce new working practices  | 28                  | 28.0%    |
| Respond to changing needs of the wider labour market   | 26                  | 26.0%    |
| Develop new products and services  | 25                  | 25.0%    |
| Undertake effective job matching to ensure efficient use of highly skilled / qualified staff | 25                  | 25.0%    |
| Base   | 100                 |          |

Source: 2010 SSA Survey

## 6.2 Working Futures projections

Employment projections, known as Working Futures, are produced for every Sector Skills Council by the Warwick Institute for Employment Research (IER). The latest projections are available for a ten year period between 2007 and 2017. Forecasts developed in 2009 can be extracted for the UK, and the four nations. The main aims of Working Futures are:

- to help in clarifying aims and objectives of policy interventions
- to provide focus for discussion
- to enable more strategic actions to be taken
- to allow employers, employees or others to make better decisions about their own futures.

It is important to note that projections are indicative of likely trends based on past data and do not aim to make precise forecasts of what will inevitably happen. It is important to note that the projections do not take into account the recent economic downturn. Nonetheless, they provide useful information and intelligence about employment trends to influence and change behaviour, and therefore outcome.

As with the FSW data, Working Futures classifies the lifelong learning sector using SIC codes, which do not cover the totality of LLUK's sectors; and in some cases have incomplete data. (Please refer to Section 2 – Methodology – for more details).

### Overall employment projections

Overall, employment levels in the Wales lifelong learning sector are expected to rise by almost 3 per cent between 2007 and 2017, which is almost half the growth rate across all sectors in Wales. These predictions are somewhat similar to trends across the UK.

### Employment projections by gender

Female employment in the lifelong learning sector in Wales is predicted to increase by almost 6.5 per cent by 2017 which is almost double the expected rise across all sectors in Wales. However, there is an expected fall in male employment in the lifelong learning sector (around 4 per cent) compared to the forecasted growth across Wales (around 7 per cent).

### Employment projections by working pattern

The number of full-time staff is expected to increase across all sectors in Wales. In comparison, the full-time lifelong learning workforce is expected to decrease by around 11 per cent. Conversely, the number of part-time staff in the Wales lifelong learning sector is forecasted to increase (by around 21 per cent) between 2007 and 2017, which is around five percentage points higher than the all sector increase in Wales.

### Employment projections by occupation

Between 2007 and 2017 in Wales, it is predicted that there will be an increase in management, professional, and personal service occupations and a decrease in most other occupations.

### 6.3 Future Scenarios

In July 2010 the Welsh Assembly Government published *Economic Renewal: A New Direction* (WAG 2010j). The document outlines how the Welsh Assembly Government is going to radically transform the way it supports the Welsh economy. It sets out the role Devolved Government can play in providing the best conditions and framework to enable the private sector to grow and flourish.

Our vision for economic renewal is of a Welsh economy built upon the strengths and skills of its people and natural environment; recognised at home and abroad as confident, creative and ambitious; a great place to live and work.

The policy identifies that the foundation of any economy is its working population and education and skills at all levels are vital for economic growth and prosperity in Wales. Delivering this is a shared responsibility for us as a Government, learning providers, employers and individuals.

For learners, this means we must create an excellent, accessible education system to give people the skills they need to prosper, especially those making the difficult transition from welfare into work or from an unskilled job towards a more rewarding career. We must open up second chances for working age adults to unlock their talents. For businesses, the same system must provide people with the skills they need today, and for the future.

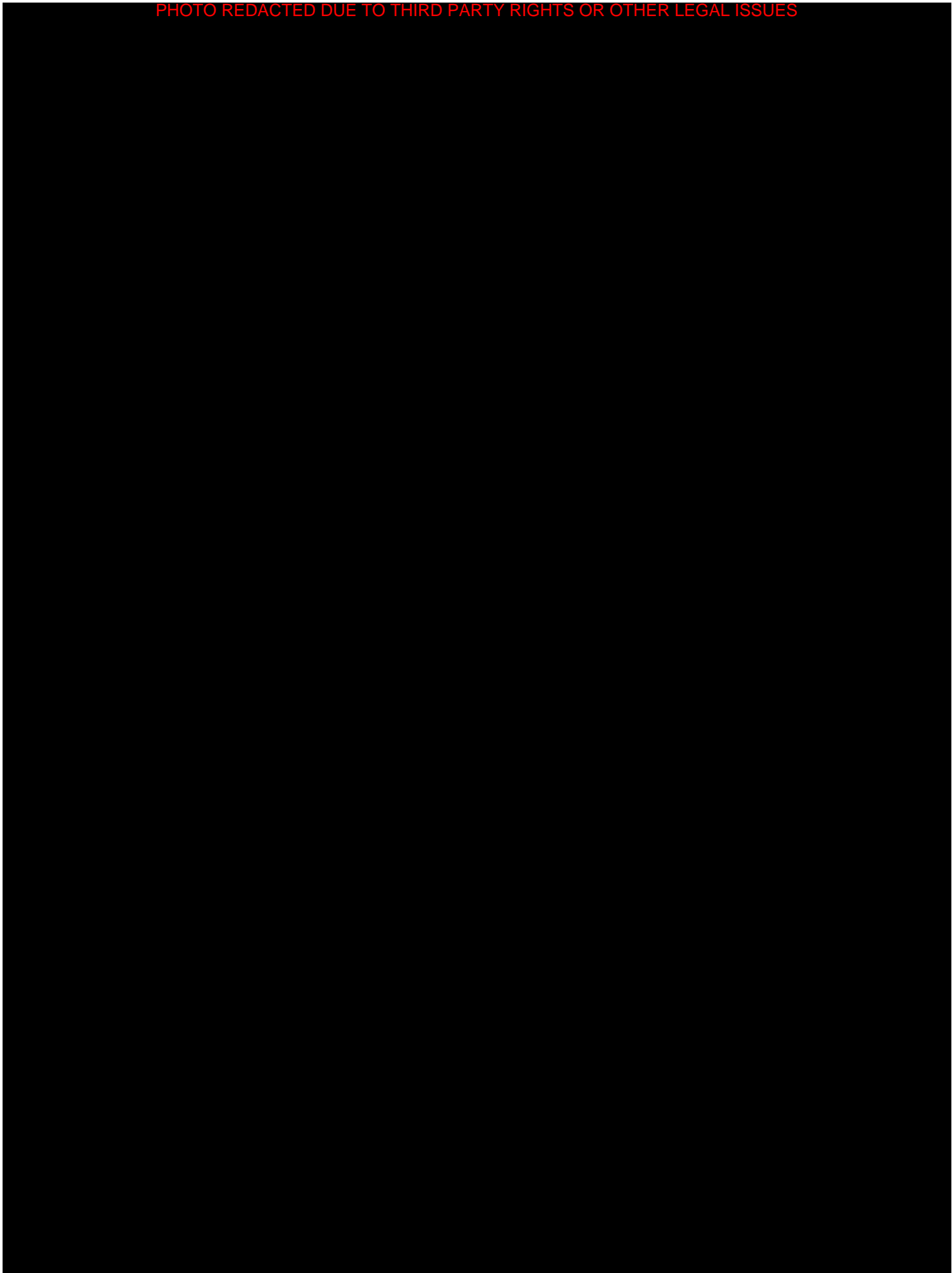
But Wales cannot address these skills challenges without having the best-trained teachers, tutors, trainers, assessors, managers and leaders in all parts of our lifelong learning system. They must be able to adapt to embrace the opportunities that Information Learning Technology offers the 'Google generation' and the impact of social networking tools on workplace practices; to effectively coach & mentor (as well as teach); and to be committed to building professional development capability and employability skills (in both themselves and their learners) at all levels of the workforce.

Whilst the impact of the UK's Comprehensive Spending Review has not yet filtered down to the level of individual departmental budgets and strategies, the decline in public funding projected over the next four years and beyond, will inevitably accelerate the reform of the lifelong learning system in Wales and we anticipate the following implications:

The emphasis on the need for economic growth (coupled with the reduction in size of the public sector) will increase the emphasis on the need for the lifelong learning sector to embed Entrepreneurship/ Intrapreneurship skills into the basic curriculum offer. Additionally to support the demand for skills generated by the emerging economic profile, including evolving sectors (e.g. green technologies) teachers, tutors and trainers in the lifelong learning sector will need to have access to professional updating opportunities to ensure that their own subject specialism skills (e.g. construction skills) keeps pace with changes in industry practice. This would be most efficiently supported by the development of a collaborative workforce strategy for the sector and enhanced partnership working with priority sector skills councils.

The *Provider Network Transformation* (WAG 2008b) agendas which are driving increased collaborative working between Further Education Institutions, Higher Education Institutions, Work Based Learning providers and Local Authorities will continue. This will drive mergers, increasing numbers of partnerships and a push towards bigger units (with increased economies of scale) and efficiencies achieved through shared back office services.

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Over the next 3 years Higher Education will receive a reduction of £51m – 11.8%; Further Education will receive a reduction of £6.5m in 2011-12 – 2.09%, with indicative budgets to 2014 remaining constant. This reduction reflects the commitment to support skills in Wales and is set in context of a 25% over 4 years applied to Further Education in England. It is anticipated, for example that the number of Work Based Learning provider contracts will reduce to 10 large providers/consortiums from 2011.

A similar scenario is anticipated for libraries where the potential development of a unitary organisation in Wales (similar to the model in Northern Ireland) may see major organisational restructuring and process changes causing significant changes to roles at all levels (support staff, professionals, and management) which in turn will drive demand for new skills. As local authorities delayer their management structures and broaden spans of managerial control, professions within local authorities anticipate that they will report to heads of service who are not professionally qualified in the services that they lead. For Archives the policy *Archives for the 21st Century* (WAG 2009d) similarly recommends the move to 'bigger and better services' to capture economies of scale offered by shared service provision. The move to open new facilities acting both as a library and community centre is anticipated to continue, as will the push to expect more from a library in terms of delivering learning, careers advice and other services.

Welsh Assembly Government have now announced the outcomes of the review *Future Ambitions: Developing careers services in Wales* (WAG 2010k). The proposal is for a more co-ordinated, better-led "family" of careers service providers with a shared identity and a shared outcome - citizens who are able to make well-informed learning and career choices. Essential components will be a unified Careers Wales; policy leadership for the "family"; a suite of accredited learning opportunities for the whole "family"; and a highly visible brand underpinned by a rigorous quality assurance system. The draft WAG budget has also highlighted that funding for the Careers Service will be reduced by £3m in 2011-12 with further reductions expected in the following years. Savings are anticipated to come from increased efficiencies following re-configuration and service delivery.

The potential development of shared service agendas will drive collaborative development on computer based training (CBT) learning materials, for example, (high front end investment but significantly reduced ongoing delivery costs) supported by the use of other social media. Shared back office services is anticipated to involve human resources; finance; and other back office functions to protect front line services etc.

Consolidation across the sector will also drive a reform of the language of the sector e.g. work based learning provision is interpreted differently in Higher Education than in other providers. The sector will need to develop a shared glossary of terms as consolidation continues to happen.

Taken together these points suggest a need for a more flexible workforce to enable the learning providers to deliver the qualifications that the economy needs, within the budgets available, and with the right profile of staff. This requires a more flexible qualification framework with underpinning statutory regulations and heightens the need to reform both the Teaching Qualification Framework and the wider Lifelong Learning Sector Qualification framework to develop awareness of transferable skills and inter-sector labour market mobility. Effective career guidance support will be required by individuals to understand how they might work in other areas of the lifelong learning sector.

The shifting balance of who pays for learning, being driven by contribution policies (how much employers and learners have to pay for learning) will drive an increase in ‘consumerism’ – with higher standards and lower costs being demanded. This will require an increase in employer and learner engagement skills, changes in teaching skills, e.g. facilitation and coaching skills; delivery of learning through ICT (enhancing teaching skills to use this medium and management skills to plan curriculums involving this medium); and self driven learning & learner involvement skills which shift responsibility to the learner to learn.

In England, the *Browne review* (BIS 2010) has recommend the removal of the teaching grant and the tuition fee cap to make Higher Education more responsive to market demands. In contrast, in Wales the minister has made it clear that Wales believes in planning the future of higher education, rather than letting the market rule. Undoubtedly there will be implications arising from implementation of the Browne review in England for Higher Education in Wales – but how this will manifest itself is not at all clear. Wales is clear that our policies would widen participation in education; would maximise the economic, social and cultural impact of universities on learners and the wider community; will require universities to work together to make the most of their resources and provide the widest possible range of opportunities for students, with a higher education system that is responsive to the needs of students, employers and the wider community and economy and which assists us in tackling poverty and disadvantage.

The Assembly Government recognises a continued responsibility to students ordinarily resident in Wales, wherever they choose to study, and to the Welsh higher education sector. Wales’ response to the Browne review will be based on One Wales and the higher education strategy, which flowed from it, *For our Future*. In *For our Future*, we set out our objectives for higher education in Wales. Central to our policy is the principle that access to higher education should be on the basis of the individual’s potential to benefit, and not on the basis of what they can afford to pay

Further education institutions in Wales are now able to apply to the Privy Council for foundation degree awarding powers (FDAPs). This provision was obtained through the *Apprenticeships, Skills, Children and Learning Act* (HM Government 2009) and came into force in Wales on 1st October 2010. The skills base will need to change for all delivery partners to reflect this shift.

Community Development, Parental Education and Family Learning practitioners within local authorities will still play an important part in the delivery of the One Wales agenda particularly Communities First which continues to receive strong governmental support. Community Development Skills will therefore be in high demand with employers reporting a high skill gap in applicants. ICT skills will also be in high demand as communities increasingly use (and are even formed by) internet services.

With anticipated funding cuts to the Welsh Assembly Government’s Third Sector and Social Enterprise budgets, third sector employers will have increased demand for fundraising, grant writing and leadership and management skills. Third Sector employers will be increasingly encouraged to join in partnerships with local authorities and the Welsh Assembly Government to access European Social Fund grants.

The lighter touch approach to formal inspection process, which is underpinned by the development of a self regulation approach (Quality and Effectiveness Frameworks) (WAG 2009g), will drive continuous improvement cultures and will increase the need for and use of National Occupational Standards and professional standards within day to day working practice.

Legislation in Wales continues to drive an increase in the level of provision of courses and qualifications through the medium of Welsh. Additionally due to the increase and success of Welsh Medium School provision both at primary and secondary level a potential increased demand for learning post 16 through the medium of Welsh and or bilingually will continue in the future. Increasing provision of Welsh Medium Education in the post compulsory sector needs to be accompanied by a corresponding increase in the number of staff who are capable and confident of delivering bilingually/through the medium of Welsh and also raising awareness amongst all staff and managers of the requirements of working in a bilingual environment – the move to include a knowledge and understanding of bilingual learning into the Initial Teacher Training for all Teachers/Tutors and Trainers coupled with the optional specialist pathways for Teachers who will deliver learning in Welsh is an essential component of increasing the workforce capacity.

Evaluation of learning and measuring the impact of interventions will be an increasingly important aspect of the lifelong learning workforce. Skills in active research methodology and the measurement of Impact will be essential in the future.

The *Leitch Review* (HM Treasury 2006), the *Webb Review* (WAG 2007b) and the *Lisbon Agenda* (Europa website 2010), identify competence in basic skills as “an essential foundation for all learning,” As noted in *Skills that Work for Wales* (WAG 2008a), “basic skills are essential for social inclusion and the platform for further learning. People who lack these skills are in danger of being marginalised in a changing economy. Echoing what was found in *Skills that work for Wales*, (ibid.), the Wales Employment and Skills Board (WESB 2009) observed in its first annual report that Wales ‘continues to have a major problem with basic skills’. It was noted that the UK ranks 20th out of 23 OECD countries in terms of the share of the population having adequate levels of literacy and numeracy and that Wales had more severe problems than almost any other part of the UK. Improving the capacity and quality of teaching and learning is essential if those with poor basic skills levels are to be supported.

A key message received through consultation this year is that looking into the future at this current time is more difficult than usual – we are in times of great change and therefore, flexibility is key.

# Section 7: Conclusions and Skills Priorities

Current research undertaken as part of this Sector Skills Assessment, ascertains that the skills priorities in Wales in 2010 are:

**Collaboration, partnership working including engagement with communities:** Public sector funding cuts; a multicultural Britain; the Coalition's Big Society vision all highlight the need for collaborative working and need for skills of partnership working with multiple organisations; with the third sector; with communities so that the organisations and people can collaborate at every level to ensure the most efficient use of resources

**Skills relating to the utilisation of e-technology:** skills to deliver learning and information to a diverse audience by making use of e-technology; social media; VLEs. For teachers, this is the new world of digital pedagogy where staff have to learn to use new modes of e-teaching in order to access a vast number of learners who may be from diverse backgrounds and remotely based. Related to this, the demand for advanced ICT skills is also on the rise, with employers demanding that their staff possess knowledge of ICT in relation to web content and doing things using electronic media. The overarching need is for a workforce that is agile enough to learn how to make use of new technology in classrooms, libraries, work based training and all other purposes

**Management skills** relate to managing change in the current economic circumstances; managing contracts and projects; managing staff including volunteers; managing behaviour; managing a diverse set of customers – be it learners or people visiting a library; and managing the change into e-learning

- Basic skills of literacy and numeracy as well as ICT skills
- Welsh language skills
- Transferable skills – so that the workforce can adapt to new and changing circumstances. This includes skills of communications, interpersonal skills, and ICT among others

**Leadership** To achieve the above, a vital skills need relates to strategic and forward thinking leadership – skilled leaders who can plan and guide their organisations; their management staff and their whole workforce into a world where public funding is limited and the electronic media is far advanced. Leaders who can think ahead, who can ensure their workforce are producing rich quality products by efficiently using limited resources. Leaders who can understand the current policy context as well as plan for the future to ensure that their organisations remain competitive and in the forefront of their sectors in the future

The skills priorities in Wales are similar to those identified in 2009 (LLUK 2010), even though they have to be viewed in the changing economic and political climate.



## 7.1 Recommendations for employers in lifelong learning

The impact of these issues can be addressed by creating a landscape in which the following approaches to skills development are facilitated, encouraged and valued. In order to achieve this, employers in the lifelong learning sector in Wales and across the UK should:

- Continue to increase collaboration and partnership working to share effective practice and take advantage of economies of scale. The lifelong learning sector needs to improve relationships and interfaces between the individual sectors to ensure that lifelong learning operates as one system.
- Develop more short courses, bite-sized training and on-line access to for learners, while continuing to ensure staff have the skills to deliver and support these delivery methods.
- Continue to improve the quality of methods of identifying staff training and development needs – National Occupational Standards can be useful here
- Focus on continuing professional development despite the current economic situation, in order to keep pace with change and prepare the lifelong learning workforce to support the skills needs of the rest of the workforce and drive economic recovery of the UK as a whole
- Continue to embed equality and diversity into working policy and practice – a diverse workforce is better able to support the demands of an increasingly multicultural and diverse population.

## 7.2 Recommendation for stakeholders and policy makers in lifelong learning

The approaches to skills development above are vital to the continuous improvement of the skills levels and productivity of the lifelong learning workforce and all sectors, in Wales and across the UK.

Stakeholders and policy makers should work with lifelong learning employers to ensure that the recommendations above can be implemented, even in the current economic situation.

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# Appendix A: Standard Industrial Classification (SIC) codes

All national data sources, such as the National Employer Skills Survey and Labour Force Survey use Standard Industrial Classification (SIC) codes, in order to classify the 'sectors' of each Sector Skills Council. For Lifelong Learning UK, the SIC codes are explained in the table below.

|       |  |   |
|-------|--|---|
| 85.31 | General secondary education                    | SIC 85.32 – “Technical and vocational secondary education” and SIC85.41 – “Post-secondary non-tertiary education” correspond to the further education sector, but this should also include an unknown proportion from SIC 85.31 – “General secondary education”.  |
| 85.32 | Technical and vocational secondary education   |   |
| 85.41 | Post-secondary non-tertiary education          |   |
| 85.42 | Tertiary education                             | These two codes equate to the higher education sector.  |
|       | 85.42/1 First-degree level tertiary education  |   |
|       | 85.42/2 Post-graduate level tertiary education |   |
| 85.59 | Other education not elsewhere classified       | SIC85.59 – ‘Other education not elsewhere classified’ corresponds to part of the CLD sector. However it does not include youth workers (Lifelong Learning UK’s research suggests that substantial numbers of volunteers and youth workers are overlooked by all SIC based surveys). This also includes some private WBL training providers. In reality, the CLD and WBL workforces are actually very distinct from each other |
| 85.60 | Educational support services                   | SIC 85.60 - “Educational support activities”. This is included in Lifelong Learning UK’s remit, but it is not clear which sectors the staff that are included work within.  |
| 91.01 | Library and archive activities                 | SIC 91.01 – ‘Library and archives activities’ does not include records managers and some archivists as these information professionals can be embedded across the other SIC codes   |
|       | 91.01/1 Library activities                     |   |
|       | 91.01/2 Archives activities                    |   |

It is important to note that SIC codes do not completely equate to the entire lifelong learning sector workforce, with youth workers, career guidance and work based learning staff not specifically covered by any one SIC code. In the case of youth workers and career guidance professionals (neither of which are covered by a SIC code) we use Standard Occupational Classification (SOC) codes; namely SOC 32.31 – “Youth and community workers” and SOC 35.64 – “Careers advisors and vocational guidance specialists”. These occupational categories (when they are not already included in our SIC code total) are also included in our workforce estimates. Other gaps in the workforce data are filled using primary or secondary research to provide quantitative data or qualitative information for context. Such specific data sources are referred to in the main body of the text.

# Appendix B: Standard Occupational Classification (SOC) codes with examples from the lifelong learning sector

| Main Occupation (based on SOC codes)                | Examples within the lifelong learning sector  |
|---|---|
| Managers, senior officials and managers in services | Senior management; CEOs; director level positions (including Chair of governors, principals, chancellors and vice chancellors); Chief or National librarians and archivists; financial managers; chartered secretaries; marketing and sales managers; heads of training; ICT managers; R&D managers; heads of departments                         |
| Professionals delivering lifelong learning.         | All professionally qualified staff such as lecturers; teachers; tutors; trainers; practitioners; assessors and verifiers; professional youth and community workers; librarians; archivists; conservators; career guidance specialists and advisors  |
| Associate professional and technical occupations    | Education support staff; any technicians employed by colleges or universities – including lab, electrical, building, engineering technicians; information officers; IT user support technicians; youth and community workers; assistant librarians and archivists; buyers; marketing; care advisors ; personnel and industrial relations officers |
| Administrative and secretarial occupations          | Accounts and wage clerks; book keepers; telephonists; library and archive assistants; general office assistants; stock control clerks; educational assistants; PAs; receptionists; typists  |
| Skilled trade occupations                           | Electricians; computer engineers; cooks; buildings and estates maintenance  |
| Personal service occupations                        | Caretakers; cleaning managers or supervisors  |
| Sales and customer service occupations              | Sales assistants; call centre staff; customer service staff or supervisors  |
| Machine and transport operatives                    | Drivers   |
| Elementary occupations                              | Cleaners; grounds staff; security staff (including janitors or caretakers); kitchen and catering assistants   |



Skills for Learning Professionals

Lifelong Learning UK

**BELFAST**

2nd Floor, Midtown Centre, 25 Talbot Street, Cathedral Quarter,  
Belfast, BT1 2LD

Tel: 0870 050 2570 Fax: 02890 247 675

**CARDIFF**

Sophia House, 28 Cathedral Road, Cardiff, CF11 9LJ

Tel: 029 2066 0238 Fax: 029 2066 0239

**EDINBURGH**

CBC House, 24 Canning Street, Edinburgh, EH3 8EG

Tel: 0870 756 4970 Fax: 0131 229 8051

**LEEDS**

4th Floor, 36 Park Row, Leeds, LS1 5JL

Tel: 0870 300 8110 Fax: 0113 242 5897

**LONDON**

Centurion House, 24 Monument Street, London, EC3R 8AQ

**Tel: 0870 757 7890 Fax: 0870 757 7889**

Email: [enquiries@lluk.org](mailto:enquiries@lluk.org)

[www.lluk.org/ssa](http://www.lluk.org/ssa)

Ref: RES/01\_2011/06



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