

Sector Skills Assessment 2010 ENGLAND

Contents

Foreword	3
Executive Summary	5
Section 1: Introduction	8
Section 2: Methodology and Response	9
Section 3: The Lifelong Learning Sector in England	12
An overview of the employment and skills landscape in England	12
Lifelong learning sector profile for England	13
Skills demand in the lifelong learning sector in England	16
Section 4: What Drives Skills Demand?	17
Economic drivers	17
Political drivers	18
Social drivers	21
Technological drivers	21
Environmental drivers	22
Conclusions	22
Section 5: Current Skills Needs	24
Recruitment and skills shortages	24
Skills gaps	28
Training provision in the lifelong learning sector	32
Section 6: Anticipating What Lies Ahead	35
Working futures projections	35
Future skills	36
Future scenarios	39
Section 7: Conclusions and Skills Priorities	40
Recommendations for employers in lifelong learning	41
Recommendation for stakeholders and policy makers in lifelong learning	41
References	42
Appendix A: Standard Industrial Classification (SIC) codes	44
Appendix B: Standard Occupational Classification (SOC) codes with examples from the lifelong learning sector	45

Foreword

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Our purpose as a sector skills council is to advance the education and training of all those working in the field of lifelong learning. This work benefits the 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 educational 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 England to 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 England has taken significant action to address these skills priorities.

We have consulted regularly with employers in the sector to design and test specific workforce solutions. We engage with employers and key national partners through constituency panels, consultation events, one to one meetings, project governance groups and advisory groups, e.g. the Disability Equalities Implementation Group, the Race Equalities Implementation Group and the Forum on Sexual Orientation and Faith.

We have developed the Equalities Framework and self-assessment tool and piloted it with 25 providers, including colleges, work based learning and adult and community learning employers. Phase 2 of the pilot is underway to ensure that the Framework promotes consistency and ensures compliance while recognising the needs of diverse staff and learners. The Framework will be launched in February 2011.

We have improved the Online Analytical Processing tool (OLAP) to help further education sector employers in developing their workforce. OLAP Reporting has been used since 2009 to access and integrate workforce data, enabling employers to better understand the skills needs of their workforce. The new features include the capability to analyse year-on-year trends and to benchmark an organisation's workforce against that of the local community. This latest version allows users to interrogate their data even further than before, while improved graphics on graphs plus simple to use dashboard reporting will ensure a more user-friendly experience.

We have continued to develop national occupational standards (NOS) and qualification frameworks for teacher training and continued professional development. We now have 14 suites of NOS containing more than 370 units. We work in consultation with a wide range of employers, partner organisations and stakeholders to ensure the NOS are relevant and fit for purpose. We are currently developing new qualifications for the learning and development workforce, and are reviewing the existing teacher, tutor and trainer qualifications in the further education sector

We have published original research and associated guidance on managing the interface between sexual orientation and faith in workplace and learning environments, and we're running free advice workshops. The guidance provides an overview of the legal requirements for the sector and focuses on six topics: staff service, learner residences, student services and student unions; teaching, learning and assessment; governance; the role of trade unions; policy, and bullying and harassment.

Our information and advice service (IAS) is staffed by professional teacher trainers and provides essential advice and relevant information to employers and employees within the sector and to individuals eager to join the sector. This year the service has responded to more than 14,000 enquiries. Nearly 50% have been about the further education sector, with nearly 35% from persons wishing to become teachers.

The future looks promising for much of the lifelong learning sector in England. The government has emphasised the need for new skills and up skilling as important drivers in the recovery. They are pushing for more apprentices across all sectors and at higher levels, and they are promoting and encouraging informal learning. We look forward to having a significant role in skills development in the nation.



Ian Homard

Director Workforce Strategy

Lifelong Learning UK

Executive Summary

This document is the Sector Skills Assessment for England 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 England. 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 England, 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)

England provided total employment to around 24.6 million people and had an employment rate of 71.1 per cent according to data from 2010.

The lifelong learning sector in England has just over 1 million employees, representing around 45,000 employers. Approximately 61 per cent of staff working in the lifelong learning sector across England are female and over 90 per cent are White – both these figures are similar to the UK average. Approximately 69 per cent of staff in England work part-time, and this is similar to the UK average. In general, 68 per cent of the workforce in England qualified to NVQ level 4 (QCF Level 5) or above.

Drivers of skills demand in England include the current economic situation, new and existing legislation and policies relating to various issues such as young people; provision of information, advice and guidance; informal learning delivery; teaching qualifications; changes to the demographic profile of the workforce; the entry of volunteers; 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. This will require 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.

The 2009 National Employers Skills Survey (NESS) which covered 79,152 employers in England and 2,629 in the lifelong learning sector, reported that 24 per cent of lifelong learning employers surveyed had vacancies. According to the NESS, most employers with skills shortage vacancies reported that applicants lacked technical, practical and job specific skills (72 per cent). The next most frequently reported skills lacking were customer handling skills (33 per cent) and management skills (31 per cent). Other soft skills reported as lacking were problem solving skills (24 per cent) and team working skills (21 per cent). There were also several basic skills shortages amongst applicants, namely literacy (30 per cent), written communication (28 per cent), numeracy 23 per cent and oral communication (22 per cent).

Other skills shortages that were reported by employers responding to the Lifelong Learning UK SSA 2010 survey include:

- Community engagement and development
- Supporting diverse learners
- Employer engagement
- Partnership working

According to the data from the National Employer Skills Survey (NESS 2009), the majority of employers in the lifelong learning sector in England regard their staff as fully proficient with only 21 per cent of employers reporting that they had staff with skills gaps. Similar to the skills shortages, the main areas of skills gaps were technical, practical or job specific skills gaps, followed by problem-solving, team-working and customer-handling. Management and general IT user skills gaps were also reported by some employers.

Other skills gaps that were reported by employers responding to the Lifelong Learning UK SSA 2010 survey include:

- Promoting and marketing
- Skills relating to new e-technology
- Advanced ICT
- Fund raising
- Management of staff, performance and change
- Employer engagement

According to the NESS, in 2009 around 90 per cent of employers had funded or arranged on-the-job or off-the-job training or development in the previous 12 months, which is similar to the figures for each region.

Overall, employment levels in the lifelong learning sector in England are forecast to rise by approximately 3.5 per cent compared with around 6 per cent across all sectors. The growth rate in employment within the lifelong learning sector is likely to be higher between 2007 and 2012 than between 2012 and 2017.

Future skills in England are similar to skills gaps and include:

- Promoting and marketing
- Fund raising
- Partnership working
- Change management
- Employer engagement
- Strategic leadership

Looking into the future, the government has emphasised the need for new skills and upskilling as important drivers in the recovery. They are asking for more apprentices across all sectors and at higher levels, and they are promoting and encouraging informal learning. However, for many the short term is not so positive with cutbacks promised in all parts of the public sector. This is likely to hit soft targets such as libraries and funded youth services, access to funding for formal learning for adults and access to higher education for young people from low income families.

Current research undertaken as part of this Sector Skills Assessment indicates that the skills priorities in England 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
- Strategic leadership skills

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 a workforce consisting of 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 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 2007) 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 seven 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 addressed

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

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 – Eight semi structured group discussions covering over 80 employers 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 times in the year to gather additional responses. For the rest of this document, the survey will be referenced as the 2010 SSA survey.

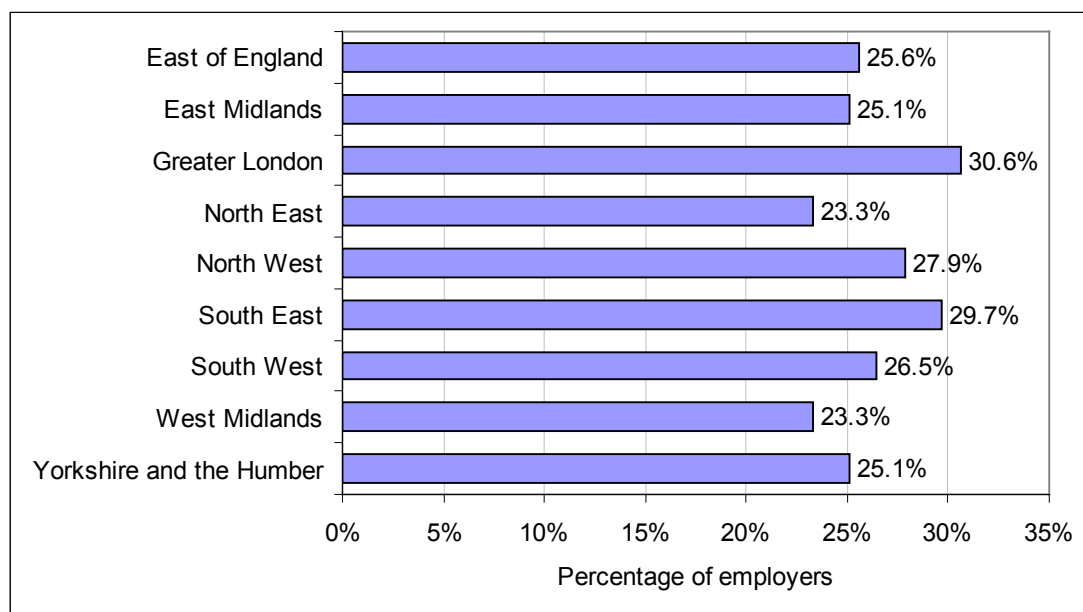
Secondary analysis' – Literature has been analysed from various sources including policy documents, stakeholder and other government reports, Ofsted reports and skills research papers. Data has been reviewed from the most recently available National Employer Skills Survey (NESS 2009); Labour Force Survey (ONS 2009), other sectoral datasets such as the Staff Individualised Returns (SIR 2008/09) in the FE sector. All national data sources use the 2007 Standard Industrial Classification (SIC) codes, in order to classify '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.

2010 SSA survey response – 221 responses from organisations based in England were received by 21st September 2010. The regional and sector breakdowns of the responses can be viewed in the charts below.

The figure below shows the regional distribution of employers that participated in the 2010 SSA survey. It illustrates that 30.6 per cent of employers were operating in Greater London and 29.7 per cent in the South East ranging to 23.3 per cent in the North East and West Midlands.

Regional Distribution of Survey Participation

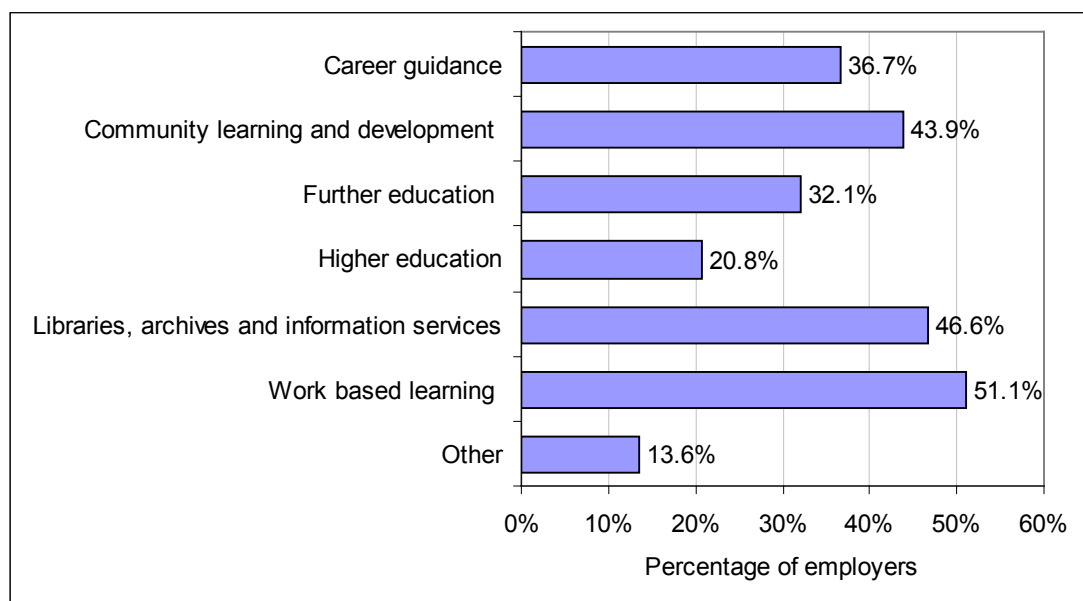


Source: 2010 SSA Survey. Base: 219 employers.

NOTE: There is double counting as an employer could be operating in more than one region.

As shown in the figure below, work based learning was provided by more SSA survey respondents (i.e. 51.1 per cent) than any other type of provision.

Survey Participation - Distribution of Provision



Source: 2010 SSA Survey. Base: 221 employers.

NOTE: There is double counting as more than one service could be provided by one employer.

Structure of report: This report sets out findings for England, 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 England 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 England.

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. NVQ Levels 1 to 3 are the same as QCF Levels 1 to 3, NVQ Level 4 is equivalent to QCF Levels 4 to 6, and NVQ Level 5 is equivalent to QCF Levels 7 to 8.

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.

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Section 3: The Lifelong Learning Sector in England

3.1 An overview of the employment and skills landscape in England

According to the latest figures from the Office for National Statistics, England provided total employment to around 24.6 million people between May and July 2010 (ONS, 2010). During this period, the employment rate for the working age population (aged between 16 and 64) was 71.1 per cent, which is 0.4 per cent points higher than the UK average (ibid.). Gross Value Added (GVA) per head, which is a commonly recognised measure of regional economic success and prosperity², was 102.4 points for England (UK=100) in 2008, which is the most recent year for which data is available. Regional variations of GVA ranged from 77.4 in the North East to 169.5 in Greater London (see table below).

United Kingdom	100
East of England	94.9
East Midlands	87.9
Greater London	169.5
North East	77.4
North West	85.6
South East	105.7
South West	91.5
West Midlands	85.1
Yorkshire and the Humber	83.3

Source: UKCES 2010

The latest version of the data from the National Employers Skills Survey (NESS) 2009, which covered 79,152 employers in England, estimated that 12 per cent of all establishments in England had vacancies, 3 per cent reported hard-to-fill vacancies³, 3 per cent a skill shortage vacancy⁴ and 19 per cent of establishments reported internal skills gaps. The proportion of employers providing some training or development to at least some of their staff has increased from 67 per cent in 2007 to 68 per cent in 2009.

When compared internationally, data from the Organisation for Economic Co-operation and Development (OECD 2009) shows that in England, 36.8 per cent of the working age population are qualified to intermediate skills levels (QCF Level 2-3)⁵. 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 (QCF Level 4-8)⁶, England has 32.1 per cent qualified to that level, compared to 31.8 per cent for the whole of UK, making England rank ahead of Sweden, Netherlands, Switzerland and Germany.

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

² 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)

³ Those vacancies classified by respondents as hard-to-fill (NESS 2009 definition)

⁴ 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 (NESS 2009 definition)

⁵ 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.

⁶ 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.

The following table, which is based on the data from UKCES, suggests that the 2020 target for NVQ Level 4+ qualifications, which is to have 40 per cent of the workforce qualified to that level, will be surpassed by one percentage point. Targets for NVQ Levels 3 and 2 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 six and four respectively. According to the forecasts, these targets will not be met either, with a higher proportion of the workforce (15 and 5 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.

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 Ambition 2020)	Projected attainment of percentage of workforce at the qualification level	Gap
Level 4+	31%	Increase to 40%	41%	Above target (by 1% point)
Level 3	20%	Increase to 28%	19%	Below target (by 9% points)
Level 2	20%	Increase to 22%	20%	Below target (by 2% points)
Below Level 2	18%	Reduce to 6%	15%	Below target (by 9% points)
No qualifications	11%	Reduce to 4%	5%	Below target (by 1% 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 later (ibid.)

3.2 Lifelong learning sector profile for England

The lifelong learning sector provides employment for nearly 1.2 million people in the UK, with approximately 53,000 employers in the sector contributing to local economies, as well as meeting the learning and skills needs of millions of people across the UK. Just over 1 million employees of the lifelong learning sector are based in England, representing around 45,000 employers. According to LLUK's *Sector Skills Agreement* (LLUK 2007), there were around 15,000 volunteers in England in the youth work sector alone.

A detailed breakdown of the numbers of employers and employees in every sector of the lifelong learning workforce can be found in the table and figure below.

Employers in the lifelong learning sector in England

	CG(a)	CLD(b) (including YW)	FE(c)	HE(d)	LAIS(e)	WBL(f)	Total(g)
England	508	41,568	365	131	869	1,515	44,956
East of England	45	3,963	34	10	75	142	4,269
East Midlands	35	3,582	25	9	51	155	3,857
Greater London	96	6,589	54	41	192	227	7,199
North East	27	1,955	21	5	51	163	2,222
North West	73	5,551	57	14	125	212	6,032
South East	80	7,264	59	18	128	295	7,844
South West	44	3,797	31	12	76	171	4,131
West Midlands	61	3,942	49	11	92	224	4,379
Yorkshire and the Humber	47	4,924	35	11	79	156	5,252

Source: LLUK Staff Individualised Record 2008-2009; Universities UK, 2010; LLUK archives profile study (LLUK, 2007); LLUK and stakeholder estimates.

Notes:

(a) Includes twelve regional publicly funded agencies providing career guidance to adults and career guidance provision in each university and college based in England, 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) Includes general further education colleges, specialist colleges and sixth form colleges.

(d) Universities and higher education institutions.

(e) Library services in each local authority, one library at each university and college based in England and archives that took part in the LLUK archives profile survey, so this figure double counts FE and HE.

(f) Skills Funding Agency funded WBL providers, including FE colleges (so double counts FE). Please note that this figure does not include commercial training provision. According to yell.com (visited on 5th October 2010) there were 7,895 companies listed as training services in England.

(g) Total including 3,361 General Secondary Education employers is 48,315 and excluding the double counting described above: 43,597.

Employees in the lifelong learning sector in England

Career guidance(a)	14,107
Community learning and development(a)	273,073
Education support activities(b)	43,277
Further education	268,310
Higher education(c)	314,805
Libraries, archives and information services	56,631
Work based learning (public funded)	30,000
Total(d)	1,000,203

Source: Labour Force Survey (ONS 2009); LLUK Staff Individualised Record for 2008-2009; Higher Education Statistics Agency (HESA) staff record for 2008-09; LLUK Archives Survey 2007; stakeholder estimates.

Notes:

- (a) Staff in the “Careers advisors and vocational guidance specialists” and “Youth and community workers” SOC codes who are not covered by a LLUK SIC code have been included in the career guidance and CLD estimates respectively.
- (b) It was not possible to allocate staff in ‘educational support activities’ to individual sectors within lifelong learning.
- (c) The higher education staff figures are rounded to the nearest five.
- (d) Including 689,629 General Secondary Education employees, the total will rise to 1,689,832

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 and in England are female and 39 per cent are male. Some variation occurs across the different sectors in England, as 71 per cent of libraries staff and 54 per cent of higher education staff 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 are below 35. The age profile does not differ considerably among the four nations. The age profile of lifelong learning sector staff in England is generally similar across the individual sectors, with the exception of a higher percentage of staff between 25-34 in higher education, between 45 and 64 in libraries and 65 or over in archives and records management.

Ethnicity profile: Over 90 per cent of the workforce across the lifelong learning sector as a whole are White. Overall, the percentage of staff who are from Black and Minority Ethnic (BME)⁷ 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 as well as England has 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. The results for England mirror that of the UK with the exceptions of higher education, where 65 per cent of staff are full-time, and further education, where 41 per cent of staff are full-time.

Occupational level: More than half of the UK lifelong learning workforce are professionals, which include lecturers in further and higher education; professional youth workers; librarians and archivists, and training consultants amongst others. Around 12 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. The profile is generally similar across the nations.

⁷ BME staff includes all individuals except for those in the ‘White British’, ‘White Other’ and the ‘not known / not provided’ categories.

Qualifications: Overall, the UK lifelong learning workforce is a highly qualified workforce, with 69 per cent of staff qualified to an NVQ Level 4 or above. This is similar across the four nations, with 68 per cent of the workforce in England qualified to level 4 or above. Employees holding a qualification at this level are slightly greater in higher education (75 per cent) and much lower in libraries and archives (50 per cent). Some sector specific data on qualifications show the following results:

- The most common qualification held in archives and records management in England is a higher degree or equivalent (Archive profile survey data, 2007).
- In England's further education colleges, 92.4 per cent of full-time and 90.7 per cent of part-time teachers were qualified or enrolled on a teaching qualification (as per Success for All⁸) in the 2008-2009 academic year (LLUK 2010b).
- 86 per cent of academic staff working in higher education institutions in England are qualified to first degree level equivalent or above (HESA 2009).

3.3 Skills demand in the lifelong learning sector in England

According to the 2009 Sector Skills Assessment, the following skills priorities were identified for England:

- 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 to enable the development of a more demand-led lifelong learning sector
- General business skills including project management, marketing, public relations, 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 class skills, and skills for embedding equality and diversity
- Basic skills including literacy, numeracy, ESOL and ICT

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.

⁸ For full-time teachers, this means currently holding or working towards one of the following: Bed/BA/BSc with concurrent qualified teacher status, Certificate in Education, Postgraduate Certificate in Education (PGCE), Preparing to Teach in the Lifelong Learning Sector (PTLLS), Certificate in Teaching in the Lifelong Learning Sector (CTLTS), Diploma in Teaching in the Lifelong Learning Sector (DTLLS), Level 3 Teaching Qualification (e.g. CG 7303) or Level 4 FE teaching qualification – stage 3. For part-time teachers, the Level 4 stages 1 and 2 are also included.

Section 4: What Drives Skills Demand?

The demand for skills is driven by a variety of factors including economic, political, social and technological changes. Since the publication of the 2009 Sector Skills Assessment, some of the biggest drivers of change in the lifelong learning sector (and indeed the labour market in general) have been the formation of a new Coalition Government and a recession hit economy. Whilst the impact of the Coalition Government's policies for reduced public funding are still unknown, 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

Reduced funding - In May 2010, soon after its formation, the Coalition Government spelled out the need for immediate action to cut Britain's record fiscal deficit, which has resulted in the reduction in the amount of Government funding across the lifelong learning sector. Some examples of the impact of reduced funding include:

- Local Authorities have seen reductions in budget and staff over the last 2-3 years. Further and deeper staffing reductions are expected in 2010. This has an impact on large parts of the lifelong learning sector including youth work, libraries, archives, community development, community education, adult and community learning and Local Authority run work based learning.
- A reduction in funded adult provision means that the workforce of the FE sector (which includes FE colleges, ACL and WBL) has to work more innovatively, collaboratively and efficiently to make better use of limited resources. For example, a reduction in Train to Gain funding will affect the workforce of FE colleges and WBL as they will need increased employer engagement skills in order to retain more employer responsive work.
- Reduction in funding in higher education as indicated in the *Browne report* (BIS 2010a) will require higher education institutions (HEIs) to compete with each other to attract the best students. It will also lead to HEIs competing for funding from elsewhere and to delivering alternative provision in the workplace, both of which will create a demand for a different set of skills.
- The funding cuts imposed have seen the budgets of the career guidance workforce serving young people cut by 25 per cent in 2010, resulting in an increased workload and demand on existing skills of the career guidance professionals.
- The plans to reduce the National Youth Agency's (NYA) staff by 60 per cent may have an effect on the workforce supporting young people. The extent of the likely impact is yet to be seen.

Globalisation - The increased integration of education across Europe ("Single European Market in Education") and the growing need to access the international market will have implications on staff skills. As institutions encourage learners from abroad to study in England, staff will require skills that enable them to support learners and customers from diverse backgrounds and countries.

4.2 Political drivers

One of the primary drivers of skills demand in the lifelong learning sector is government policy and regulation. The overall policy context for the lifelong learning sector is set by the new skills strategy in England, *Skills for Sustainable Growth* (BIS 2010b), which replaces the *Skills for Growth strategy* (BIS 2009c). The strategy aims to simplify the skills landscape and empower individuals to have ‘consumer choice’ over the skills they wish to develop. The three principles of the strategy are

- Fairness – most attention will be paid to young people and those without basic literacy and numeracy skills.
- Responsibility – employers and individual learners are required to take greater responsibility for ensuring their own skills needs are met.
- Freedom – The individual learner, not numbers and targets, will be placed at the heart of the whole learning process and primary accountability will be to the learners, not Government.

Apprenticeships serve a central role in the strategy. The number of Apprenticeships is set to increase, but also the progression routes from Level 3 to Level 4 Apprenticeships and higher education will be clearer. Alongside this will be a wider and more flexible system of vocational qualifications, and protected funding for informal adult and community learning. The strategy also emphasises the importance of investment in training by employers and individuals.

Overall the strategy aims to develop a framework which helps individual people and their employers to get at the learning they want or need with an emphasis on progression to higher skills or to other forms of lifelong learning, including informal learning. This will involve reducing the artificial distinctions between further and higher education; between different types of institutions or programmes, and between formal and informal learning to create a system that is responsive to the demands of individuals, employers, the sector and the wider society.

Keeping in mind this broader context, the next section focuses on specific policies, legislation and regulations (both new and existing) that have an impact on the lifelong learning sector.

Legislation and regulations relating to young people

- Under new Coalition Government policies, Local Authorities are required to provide integrated services for children and young people. This means that youth services are no longer separate from the administration of schools or social services. Although a positive step in bringing together services in different areas, this change requires more skills in dealing with both the expectations of individuals in different areas of children’s services, and how to deliver youth services within a context of children’s services.
- Reforms relating to Young People in compulsory and post-compulsory education and training settings - from April 2010, responsibility for securing sufficient education and training for all young people, being assessed for a learning difficulty and/or disability, as well as juveniles in custody moved from the LSC to Local Authorities (LAs). This means new skills are required for Local Authority staff relating to assessing for a learning difficulty and/or disability, juveniles in custody, as well as skills relating to safeguarding young people.
- Increasing the participation age – through the Education and Skills Act 2008, the Government legislated to raise the compulsory participation age in England to 18 by 2015, where young people will be required

to participate in full or part time education or training until their 18th birthday. This continues to place additional demands for staff in learning providers to ensure all young people are engaged.

- It is important to note that the *Wolf Review* (DFE website 2010), which will report in Spring 2011, will have implications for parts of the FE sector. The Wolf Review into vocational education for 14- to 19-year-olds will look at the organisation of vocational education and its responsiveness to a changing labour market and will consider ways to increase incentives for young people to participate. Specifically, it will examine
 - institutional arrangements and funding mechanisms including arrangements for who bears the cost of qualifications
 - progression from vocational education to work, higher education and higher-level training
 - the role of the third sector, private providers, employers and awarding bodies.

Legislation relating to career guidance

The key influential policy-based development is the creation of the Adult Advancement and Careers Service (now branded Next Step), which has potential to act as the significant skills driver in career guidance. Next Step aims to help adults overcome barriers to employment and learning through provision of career information, advice and guidance and related support such as advice on childcare, personal finance and disability issues. This development is likely to result in the demand for skills and knowledge in a range of areas including use of ICT for delivering information, advice and guidance services.

John Hayes, Minister for Further Education, Skills and Lifelong Learning, announced in November 2010 that an all age careers service would be introduced in England, building on the best aspects of Connexions and Next Step provision (Institute of Career Guidance website 2010). The new service is to be fully operational by April 2012. This will not mean an expansion in the workforce but is likely to lead to significant training needs including specialist career guidance skills.

Policies relating to new ways to deliver learning

The *Learning Revolution White Paper* (BIS 2009a) promoted the benefits associated with informal learning, as a way of developing skills, improving the well-being of communities, and developing the confidence of individuals. This impacts the skills of those tasked with the role of increasing access to informal learning, building the confidence of individuals who would not normally engage in learning, collaborating and engaging with volunteers and facilitating networks of support and solidarity. This policy has an impact on large parts of the lifelong learning sector including community learning and development, work based learning and libraries.

Ed Vaizey, Culture Minister, in his first public speech on libraries in July 2010 (DCMS website 2010) suggested shared services, merging functions; staffing across authorities; support from volunteers and the use of other community buildings as new ways of working for the libraries sector. Mr. Vaizey also highlighted the position of libraries in the current economic climate to help people back to work; to access learning and as a central plank of community cohesion. He announced – in collaboration with the Society of Chief Librarians – a public library promise that the library network will help half a million people gain digital skills by the end of 2012.

Higher Ambitions: the future of universities in a knowledge economy (BIS 2009b) set out the need for delivery of HE in non traditional settings, including delivery by non traditional providers, in non traditional settings, and having a greater engagement with industry and commerce in developing and delivering course modules. Such a change in HE will demand greater partnership and collaboration skills, better employer engagement skills, and skills for learning delivered in different ways to a more diverse student group. Furthermore, demand for partnership and collaboration skills with industry and commerce are likely to result in the growth in business development roles and more enterprise skills, including the skills of marketing and promotion.

Another feature within HE is the emergence of private universities, which is already resulting in new ways of delivering learning including online degree courses. This requires a different set of skills compared to learning delivery in traditional institutions.

Moreover, within FE and HE, as the student population demands better value for money of their courses, colleges and HEIs have to adopt a personalised approach, which will result in the demand for new skills in staff.

Legislation or contractual requirements relating to teaching qualifications

From 2007, all new teachers in the FE sector (FE colleges, ACL and WBL) need to hold or be working towards either Qualified Teacher in Learning and Skills (QTLS) or Associate Teacher in Learning and Skills (ATLS) status as part of initiatives to ensure the quality of teaching. Teachers who began teaching in FE Colleges before 2001 are exempt from having to complete the new qualifications, but may take the opportunity to upgrade their skills. From 2007, there is a five year window to enable new teachers to achieve the required qualifications. The situation for ACL and WBL is that those in place before September 2007 (analogous with FE college staff pre 2001) will be classed as “qualified”.

Other policies such as the Freedom of Information Act, the Data Protection Act and the Equalities Act will continue to serve as drivers of skills in the lifelong learning sector as they cover broader issues affecting all parts of the UK workforce.

It is clear that political drivers will continue to have a significant impact on the lifelong learning sector with particular attention to the following areas:

- Attention to the views of young people
- Provision of information and advice
- New ways of learning delivery, including informal and e-learning
- Collaboration between sectors and the usage of shared services
- Progression opportunities into higher education
- Further improvement of the quality of provision in colleges and training providers
- Continuation of demand-led funding
- Responsiveness to needs of businesses

As indicated in the 2009 Sector Skills Assessment and confirmed in the 2010 research, these skills issues continue to be foci for attention.

- Greater focus on skills required for the modern world of work, including new and emerging sectors and skills for the knowledge economy
- Wider and more accessible skills training at every level
- A skills system based on real world outcomes that is taught expertly and carries weight with employers
- Empowerment of adults with the confidence, self-motivation and skills needed in a changing world
- Raising recognition of the value of investing in workforce skills within businesses
- Expansion of the system of apprenticeships for young adults and encouragement of technician level staff

4.3 Social drivers

Demographic changes

- With the abolition of the statutory age of retirement and an increase in the age at which the state pension is payable, there will be a larger number of people in the active workforce for a longer period. This ageing workforce will need skills to compete in and contribute to a rapidly changing labour market. A related issue is around skills post-retirement for those that want to continue to work or volunteer, perhaps in a different field or trade. This is likely to result in an increased number of older adults accessing learning provision.
- Forecasting data from 2007 (HEPI 2007) suggested that the 18-20 year-old age group would peak in 2010 and decline significantly for the following decade by more than 13 per cent. This could mean a future fall in absolute demand for HE courses by this age group, implying a possible reduction in the demand for staff. For FE and WBL, this decline could indicate that, in order to maintain and/or grow their volume of activities, they will have to reach out on a larger scale to other age groups as well as those already at work (CBI 2009). This applies to the HE sector as well (CBI 2008).

Inward migration will result in an increasingly diverse student and customer population. Anyone who delivers learning and information to immigrants will require cultural knowledge and sensitivity so that learning and information delivery is effective and appropriate.

Increasing numbers of volunteers in the workforce - The Coalition Government's agenda of 'Big Society' (Cabinet Office, 2010) will see a change in the makeup of the workforce with volunteers playing a larger role. For example, a report on Big Society by the Royal Society of the Arts (RSA 2010) discusses the value of volunteers in the prevention of anti-social behaviour and crime with "public-service workers, local residents and volunteers play(ing) a more active role in crime intervention through the introduction of courses in community safety skills focusing on aspects such as self protection and restraint, "reading" a situation and defusing it."

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). Specific examples of impact on skills include:

- For career guidance providers, this could mean the need for innovative and increased use and application of new technologies in the delivery of 'remote' advice/ guidance including use of video conferencing to deliver to clients, telephone IAG and an increased use of web-chat.
- Within libraries and archives, the impact of the digital agenda has been felt for a long time with e-libraries providing online access to digitized content drawn from a variety of sources and making greater use of digital preservation techniques. The impact of this driver in the LAIS sector, therefore, is even more advanced with the workforce expected to be skilled not only in e-delivery of content, but in issues like online privacy, accessibility, and providing quality content.

4.5 Environmental drivers

The first budget of the Coalition government delivered in June 2010 confirms that the green agenda is a key driver and has potential to impact on the lifelong learning workforce. The main impacts of the green agenda are:

- Frontline delivery staff will need to be up-skilled in the applications of green technology in order to deliver relevant and up-to-date provision. For example, Gateshead College have partnered with Smith Electric Vehicles to launch the first ever apprenticeship dedicated to electric vehicles.
- All staff need knowledge and awareness of environmental sustainability

4.6 Conclusions

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. This will require 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.

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

- Greater employer engagement and involvement
- Partnership and collaboration across sectors
- Utilisation of e-technology
- Strategic leadership
- Management of learning
- Basic skills and ICT
- Transferable skills

Case Study

Skills Need: collaboration and partnership, management and leadership

Organisation: Lancashire Learning Consortium CIC, England

In 2009, Lancashire Learning Consortium (LLC) secured nearly £0.5million from the Big Lottery Fund to provide leadership and management training to up to 360 learners from community and voluntary sector organisations in the Lancashire area. To address this skills need, LLC approached Edge Hill University to collaborate on the development of a new bespoke management qualification in the form of the Post Graduate Certificate in Voluntary Sector Management.

The Certificate is a 60 credit qualification at Masters Level that takes about nine months to complete. It is awarded after successful study of three of four modules, including Voluntary Sector Governance, Managing People, Strategic Business Planning, and Networks, Partnerships & Stakeholder Relations. Each module has three Day School sessions, supplemented by use of an e-learning platform and private study. The Certificate has been developed for voluntary and community sector organisations, charities and social enterprises and their paid staff, managers, unpaid volunteers, charity trustees, members of management committees and directors.

“Our collaboration has resulted in an exciting new accredited management programme for voluntary sector and civil society organisations, one of only a handful in the UK at Post Graduate level,” explained Jonathan Gilbert, Development Manager at LLC. *“Our work with Edge Hill shows that the collaboration model between a voluntary sector infrastructure body and a higher education provider can be extremely productive. Voluntary sector organisations have reach to learners and investors and higher education provides the quality and academic vigour needed.”*

Based on their initial success, interest in the programme and intellectual co-ownership, Lancashire Learning Consortium and Edge Hill University have an exciting opportunity to expand the Certificate to other parts of the UK.



Section 5: Current Skills Needs

This section reviews 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, data from the National Employer Skills Survey (NESS) 2009 is used to report on skills shortage vacancies and skills gaps as viewed by employers in the lifelong learning sector. The most recent NESS data classifies the lifelong learning sector using SIC 2007 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). Therefore, data is used from other sources including LLUK's 2010 SSA survey to obtain richer details of employer 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

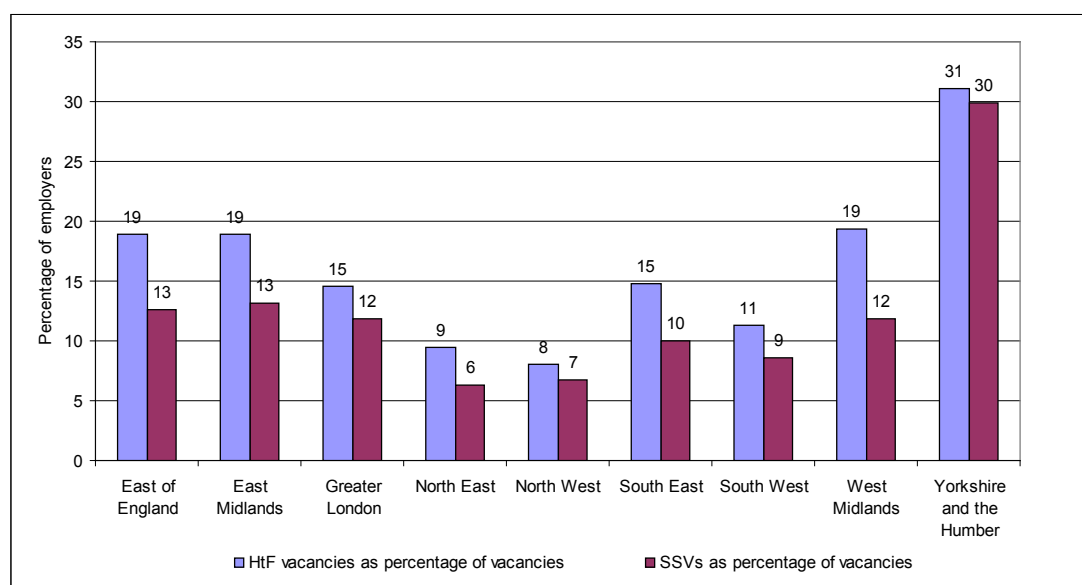
Skills gap - This exists when the employer indicates that staff at the establishment are not fully proficient at their jobs.

The 2009 National Employers Skills Survey (NESS) which covered 79,152 employers in England and 2,629 in the lifelong learning sector reported that 24 per cent of lifelong learning employers surveyed had vacancies. This is higher than the percentage of vacancies reported by all employers in England (12 per cent) but compares closely with other SSCs which are largely composed of public sector employers such as Skills for Care and Development (24 per cent) and Skills for Justice (26 per cent).

According to the same NESS survey, around five per cent of employers in the lifelong learning sector in England have hard to fill vacancies and around four per cent of employers have skills shortages vacancies, compared with three per cent across all employers in England for both hard to fill and skills shortage vacancies.

Of all vacancies in the lifelong learning sector reported in NESS, 15.7 per cent were hard-to-fill vacancies and 11.9 per cent were skills shortage vacancies. The regional variations of these types of vacancies are shown in the figure below, which varies between Yorkshire and the Humber where 30 per cent of all vacancies were skills shortages vacancies compared with 6 per cent in the North East.

Regional Variation of Vacancies

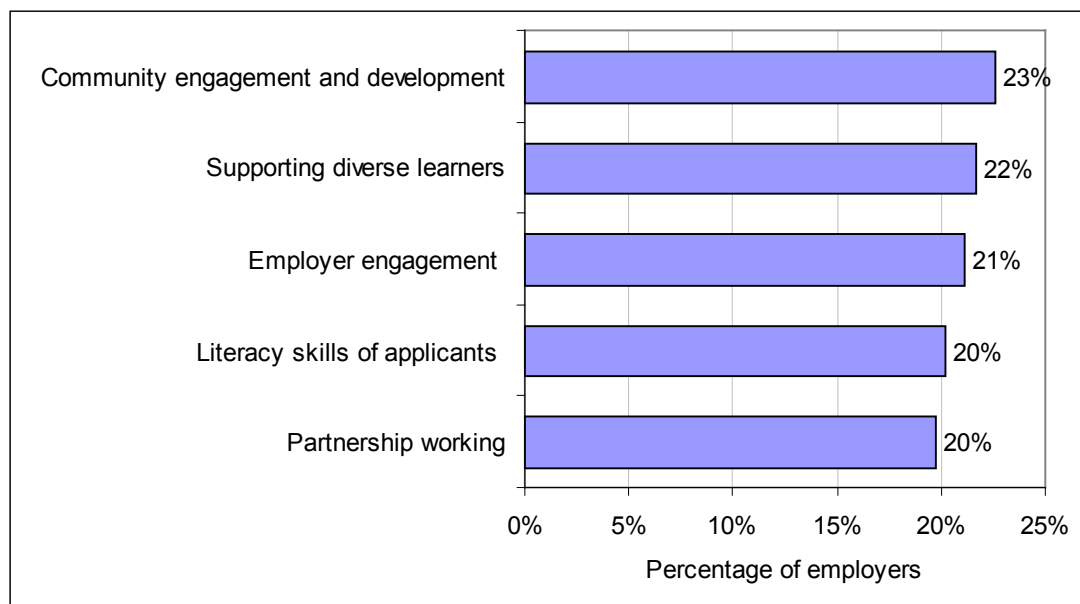


Source: NESS 2009

Most employers with skills shortage vacancies reported that applicants lacked technical, practical and job specific skills (72 per cent). The next most frequently reported skills lacking were customer handling skills (33 per cent) and management skills (31 per cent). Other soft skills reported as lacking were problem solving skills (24 per cent) and team working skills (21 per cent). There were also several basic skills shortages amongst applicants, namely literacy (30 per cent), written communication (28 per cent), numeracy (23 per cent) and oral communication (22 per cent).

Employers in the lifelong learning sector that participated in the 2010 SSA survey were asked about skills shortages as well. According to their responses, the top skills shortages include engagement skills (for example, community engagement and employer engagement) and literacy skills. These are highlighted in the diagram below:

Skills Shortages



Source: LLUK 2010 SSA survey, base 208

Other specific skills shortages have been identified through additional sources of information:

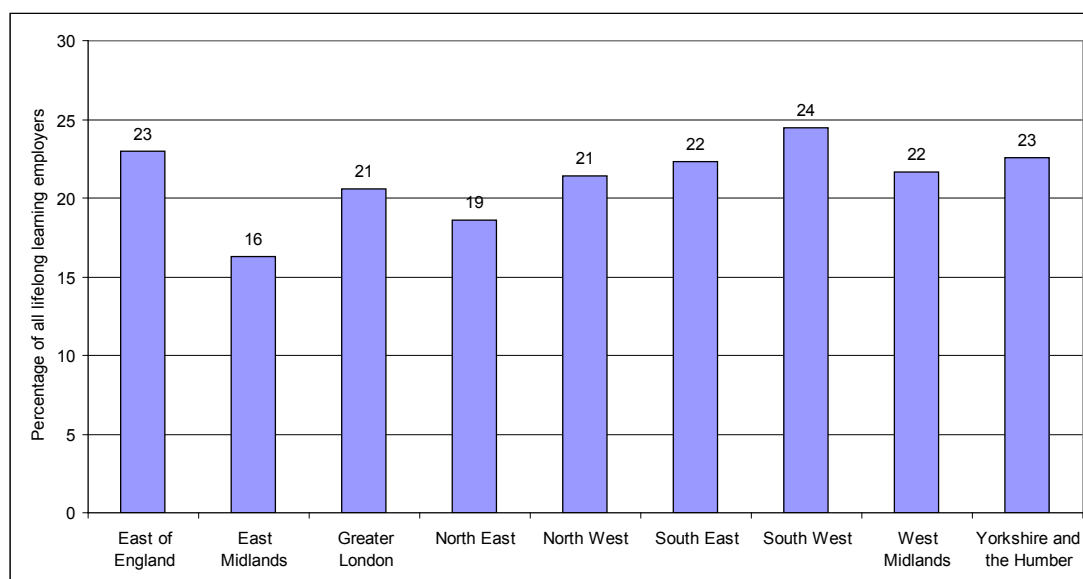
- Basic and ICT skills continue to be skills shortages across the lifelong learning sector. Employers participating in LLUK's 2010 SSA survey highlighted numeracy (18 per cent) and literacy (20 per cent) as skills shortages across England with some evidence of these issues being prominent in most regions. The data also suggests that these issues are faced by more further education and work based learning providers.
- Across the lifelong learning sector, there is a lack of skilled applicants who are experts in delivering effective learning efficiently using new and social media. 16 per cent of employers responding to LLUK's 2010 SSA survey cited management of digital information as a skills shortage, with more library, archive and information service providers reporting this to be an issue when compared to the other sectors.
- Skills shortages were outlined in the FE sector relating to the priorities of Young People in compulsory and post-compulsory education and training. Shortages also related to applicants not possessing the adequate and relevant understanding of the implications of this policy agenda. For example, working with the 14-16 year old group requires a different set of skills from dealing with older or adult learners, such as providing greater pastoral care and behaviour management.
- Skills shortages relating to community engagement and development were identified among youth related occupations. Applicants for youth work show a lack of skills to assess and deliver to a diverse range of young people.
- Employer engagement and partnership working were also identified as skills lacking amongst applicants, as shown in the graph above. However, according to the survey, both are greater issues for career guidance, further education and work based learning providers. Partnership working is more of an issue for providers of community learning and development.

- Within HE, subject areas with academic recruitment shortages included business/ management, accounting/ finance and law. According to a survey conducted in 2008 (UCEA 2008), there was more difficulty for the recruitment of biological sciences staff and less for IT/ computing staff when compared to previous years. In terms of academic staff grade, the majority of difficulties concerned the recruitment of lecturing staff with slightly fewer difficulties reported at professor or researcher levels. This finding was consistent with previous survey findings by the UCEA.
- Career guidance organisations in England suffer less from shortages than other nations (TBR 2009), with only 19 per cent having difficulties recruiting. The main reasons for skills shortages include the lack of specialist career guidance skills, lack of experience and lack of relevant qualifications. Another reason for the skills shortages was the lack of applicants experienced in working with people with learning difficulties and/ or disabilities.
- Professional IT skills were one of the main areas of skills shortages among almost every part of lifelong learning. Specific reasons for recruitment difficulties include the lack of understanding of legal frameworks such as the Freedom of Information Act and the Data Protection Act; IT skills and use of digital technology in delivering guidance services within career guidance applicants; skills related to specialist software packages; programming and data security.

5.2 Skills gaps

According to the data from the National Employer Skills Survey (NESS 2009), the majority of employers in the lifelong learning sector in England regard their staff as fully proficient with only 21 per cent of employers reporting that they had staff with skills gaps. This has increased by two percentage points from 19 per cent since 2007. For all employers in England, this figure has increased from 15 per cent in 2007 to 19 per cent in 2009. The regional breakdown of skills gaps across the lifelong learning sector in England can be seen in the figure below. It shows that the number of employers reporting skills gaps ranged from 16 per cent in the East Midlands to 24 per cent in the South West.

Employers Reporting Skills Gaps



Source: NESS 2009.

Within the lifelong learning sector, skills gaps were highest in higher education, but low in both educational support activities and libraries and archive activities.

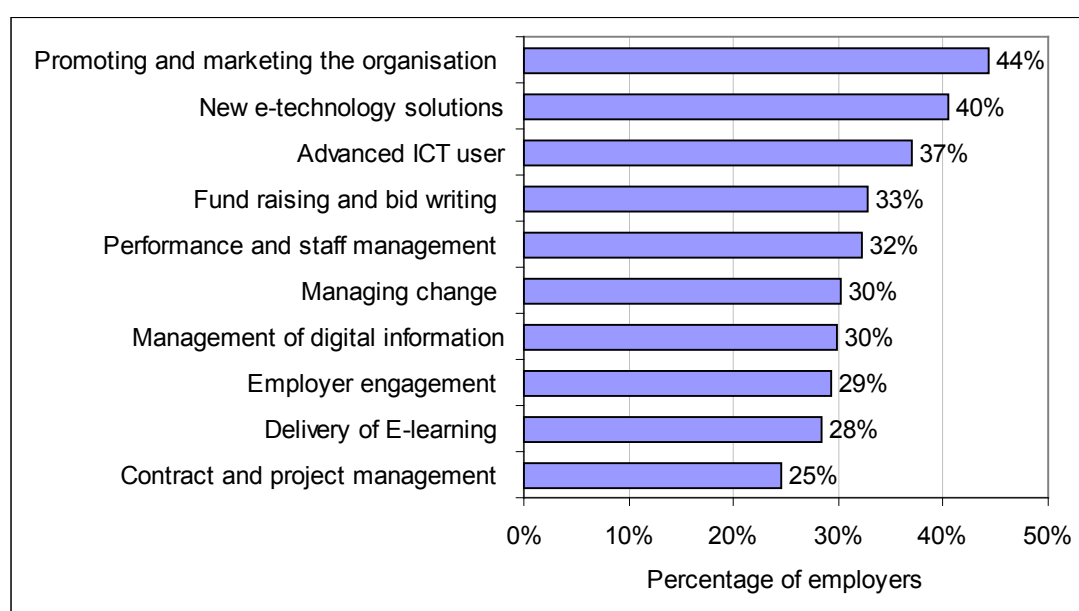
The primary reason for skills gaps is a lack of experience and staff having been recently recruited. This accounted for 74 per cent of skills gaps in 2009, higher than reported in 2007 (71 per cent) indicating that recruitment still remains a major issue for employers in the lifelong learning sector. High staff turnover accounted for about one-tenth of skills gaps. However, its importance may have decreased over the past year as only a minority (nine per cent) of employers responding to LLUK's 2010 SSA survey reported recruitment as a main cause of skills gaps.

Other causes of skills gaps included lack of staff motivation (28 per cent), the inability of staff to keep up with change (26 per cent) and employer failure to support relevant training and development of staff (20 per cent). These have all increased since 2007, and remain significant as the majority of 2010 SSA survey respondents reported that skills gaps were due to staff related causes. This indicates the need for a continuing focus on workforce development within the sector.

Similar to the skills shortages, the main areas of skills gaps were technical, practical or job specific skills gaps, followed by problem-solving, team-working and customer-handling. Management and general IT user skills gaps were also reported by some employers.

Employers in the lifelong learning sector that participated in the 2010 survey were asked about skills gaps as well. According to their responses, the top skills gaps include skills such as marketing, management and delivery of e-learning. These are highlighted in the diagram below:

Skills Gaps



Source: LLUK 2010 SSA survey, base 208

Other skills gaps identified through additional sources have been grouped into the following broad categories:

Collaboration and multi agency partnership working skills was reported by 18 per cent of employers in LLUK's 2010 SSA survey as a skills gap. This relates to the increasing need for employers to develop closer relationships with other parts of the lifelong learning sector as well as other sectors so that services can be delivered more efficiently within limited resources.

For example, the likely funding changes of higher education institutions in the next 5 years will create a demand for more collaboration, clusters and mergers, and a corresponding demand in the skills of partnership working particularly with employers, as evidenced by the work delivered through the Higher Education Innovation Fund (HEIF) and Strategic Development Fund (SDF).

Community engagement and development were reported by 18 per cent of employers as a skills gap in LLUK's 2010 SSA survey. The Coalition Government's agenda emphasises the building of a 'Big Society', where "citizens, communities and local government (have) the power and information they need to come together, solve the problems they face and build the Britain they want ... a society (where) the families, networks, neighbourhoods and communities...are given more power and take more responsibility..." (Cabinet Office, 2010). Within this context, skills relating to the engagement and development of communities are of immense

importance in the future, alongside those of multi agency and partnership working. Furthermore, funding cuts will result in the introduction of more volunteers into the community who will need to be engaged with and supported to meet the demands of their roles.

E- learning delivery was reported by 28.3 per cent of employers (see figure above) in LLUK's 2010 SSA survey as a skills gap, and was identified as one of the top 10 skills gaps for all parts of the lifelong learning sector. For work based learning employers, it featured in the top five. Changes in technology impacts across all sectors from teaching and learning practices, including greater use of e-learning and virtual learning environments, to the digitisation and preservation techniques of libraries and archives and information management needs and analysis.

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 are remotely based

Career guidance is experiencing issues in finding appropriately skilled and knowledgeable trainers to upskill the workforce, particularly around the use of new technology. Higher usage of new technologies is anticipated in delivering services to clients and in managing remote teams

Related to this, the demand for advanced ICT skills is also on the rise, with employers across the lifelong learning sector demanding that their staff possess knowledge of ICT in relation to web content and using electronic media. 37 per cent of employers responding to LLUK's 2010 SSA survey reported advanced ICT user skills as lacking among existing staff (see figure above).

Management skills feature in the top 10 skills gaps in LLUK's 2010 SSA survey and include a diverse set of skills relating to management:

- change in the current economic circumstances
- contracts and projects
- staff including volunteers
- behaviour
- diverse set of customers – be it learners or people visiting a library
- change related to increased use of e-learning

In the SSA 2010 survey, employers of community learning and development cited fundraising and bid writing skills as parts of management skills gaps. These skills included bid and contract writing, which are required to generate additional funds through competitive bids. Reduction in public funding will result in alternative models of governance and service delivery, which will require skills around commissioning of services as well as the delivery of commissioned services. These skills were highlighted as important skills gaps across most sectors of lifelong learning in the 2010 SSA survey. Specifically, the LAIS sector spoke about being 'commission- ready', i.e. the ability to make business cases, be aware of true cost of delivery and capable of financial management.

Project management skills are equally important to ensure projects are adequately managed in relation to time, budget and resources, requiring skills needs of general and financial planning and resource management.

Staff and team management skills were reported by 32 per cent of employers in LLUK's 2010 SSA survey as skills gaps, with some evidence of this being slightly more of an issue in higher education than other parts of the lifelong learning sector. Almost all sectors reported the need for team working skills, specifically communication skills.

Dealing with cost-cutting, rationalisation and demand for leaner and more agile institutions require skills of change management, reported by 30 per cent of employers in LLUK's 2010 SSA survey. Leaders and managers are required to be effective change agents. This new skill demand can have a positive effect on FE and HE competitiveness by enabling institutions to be better performing with the manoeuvrability to adapt to change quickly and competently.

In such a rapidly changing environment, learner needs are changing too. Staff have to respond to diverse learner and customer needs. This was reported by 16.8 per cent of employers in LLUK's 2010 SSA survey. Multiculturalism and the digital age have already been mentioned as drivers of skills demand. Both have created a new breed of learners who have to be supported. For example, those providing information and advice need to build their confidence in interacting with new client groups as well as building the confidence of highly qualified clients. Within the FE sector, behaviour management with the 14-16 age group has also been cited as a skills gap as it requires a different set of skills from dealing with older or adult learners, such as providing greater pastoral care as well as behaviour management.

A related skills need is around assessing learners and learning, reported by 21.6 per cent of employers to the LLUK 2010 SSA survey. Ways to deal with this skills need have been suggested by Ofsted in various reports in 2009:

- Train to Gain providers should improve the use of individual learning plans, progress reviews and target-setting to help employees make better progress in the FE sector (Ofsted 2009a);
- All family learning providers further develop effective systems to monitor progress and outcomes for parents, carers and children; (Ofsted 2009b)
- Providers in all sectors should put in place quality assurance procedures that evaluate virtual learning environments (VLE) usage and set standards, but that also balance the need for individual staff responsibility for their own material, with a requirement to ensure that widely available material is relevant, current, understandable to individuals, and suitable for the institution (Ofsted 2009c).

With youth work becoming an increasingly important vehicle for informal learning provision for young people, quality assurance skills are in demand to help increase capacity in the sector to deliver key programmes such as youth work apprenticeships. Training providers have indicated there is a lack of take-up of assessor units and qualifications because they believe that employers are unclear of the key role assessor skills play in capacity building within their workforce. Management staff need to develop skills to understand the importance of assessor skills as reliance on external organisations providing assessment is costly and can prevent employers from developing their workforce. 21.6 per cent of employers responding to the LLUK 2010 SSA survey report assessing learning and learners as a skills gap, with evidence suggesting that this was a relatively bigger issue for employers providing community learning and development.

Skills gaps related to leadership included:

- Lack of specific awareness of policy issues, which was cited by employers in the FE sector
- Lack of strategic planning skills (including being prepared to address the digital agenda), cited by 24 per cent of all employers in the LLUK 2010 SSA survey as a skills gap, with a higher proportion of HE employers citing it as a skills gaps than others.

Basic and ICT skills continue to be skills gaps across the lifelong learning sector. Employers responding to LLUK's 2010 SSA survey reported the following skills lacking among existing staff: Numeracy (15 per cent), Literacy (11 per cent); ESOL (9 per cent); and Basic ICT (7 per cent)

An increased workload for other staff was the most common impact of staff having skills gaps, reported by 64 per cent of employers in the NESS. Other impacts reported were difficulties in introducing new working practices and in meeting quality standards and increased operating costs. NESS reported that lifelong learning employers are addressing their skills gaps through increasing workforce development initiatives. These include increasing training activity or spend, expanding trainee programmes, more supervision of staff, more staff appraisals / performance reviews, implementation of mentoring and buddying schemes, and increasing recruitment activity and spend. However, four per cent of employers are taking no action at all to address their skills gaps.

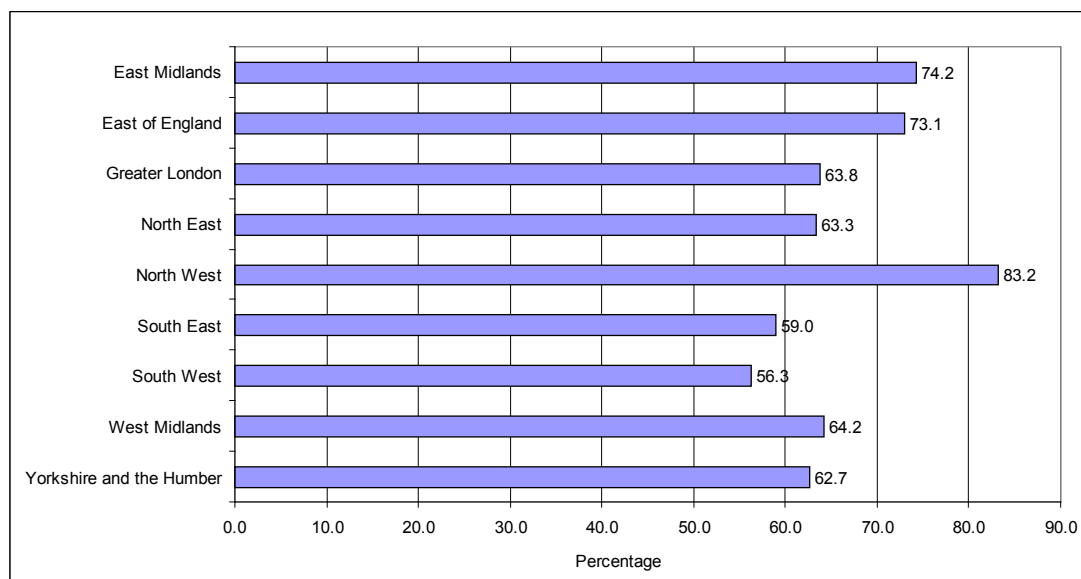
5.3 Training provision in the lifelong learning sector

According to the NESS, in 2009, around 90 per cent of lifelong learning employers had funded or arranged on-the-job or off-the-job training or development in the previous 12 months, which is similar to the figures for each region. Employer training within each sector of lifelong learning England is greater than the average for all sectors (68 per cent). A large majority (96 per cent) of respondents to LLUK's 2010 SSA survey reported that they had funded or arranged training or development covering 38,300 staff in the past 12 months.

Additionally, there are established formal measures related to training provision within the lifelong learning sector in England. In 2009, 92 per cent of lifelong learning employers had either a business plan, training plan or budget for training expenditure and 54 per cent had all of these in place. A large majority of employers in the 2010 SSA survey had an organisational training plan (76.8 per cent) and budget (72.3 per cent). However, the embedding of government training initiatives is varied with only a minority of employers having made the Skills Pledge (13.0 per cent) compared to 46.8 per cent having achieved Investors in People status (2010 SSA survey).

The following figure shows regional differences in the percentage of staff trained in the 12 months before the NESS (Proportion of staff trained as a percentage of all in employment). The percentages vary from 56.3 per cent in the South West to 83.2 per cent in the North West.

Regional Differences in Percentage of Staff Trained



Source: NESS 2009

Respondents to the Labour Force Survey (ONS 2009) report whether they have received training through their work in the last three months. 38 per cent of staff from the lifelong learning sector in England had received such training, compared to 26 per cent across all sectors in England.

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Section 6: Anticipating What Lies Ahead

6.1 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, the four nations, and English regions. 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 in this section are indicative of likely trends based on past data and do not aim to make precise forecasts of what will inevitably happen and 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 NESS data, Working Futures classifies the lifelong learning sector using SIC codes, which do not cover the totality of LUK'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 lifelong learning sector in England are forecasted to rise by approximately 3.5 per cent compared with around 6 per cent across all sectors. The growth rate in employment within the lifelong learning sector is likely to be higher between 2007 and 2012 than 2012 and 2017.

Employment projections by gender

Female employment in the lifelong learning sector in England is expected to increase by almost 5 per cent by 2017 which is similar to the percentage across all sectors. However, the rise in male employment is likely to be much slower (around 1 per cent) than that experienced in England (around 7.5 per cent) generally.

Employment projections by working pattern

The number of full-time staff is expected to increase across all sectors in England. In comparison, the full-time lifelong learning workforce is expected to decrease by around 3 per cent. The number of part-time staff in the England lifelong learning sector is forecasted to increase (by 10 per cent) at a similar rate to the all sector increase (of 11 per cent) between 2007 and 2017.

Employment projections by occupation

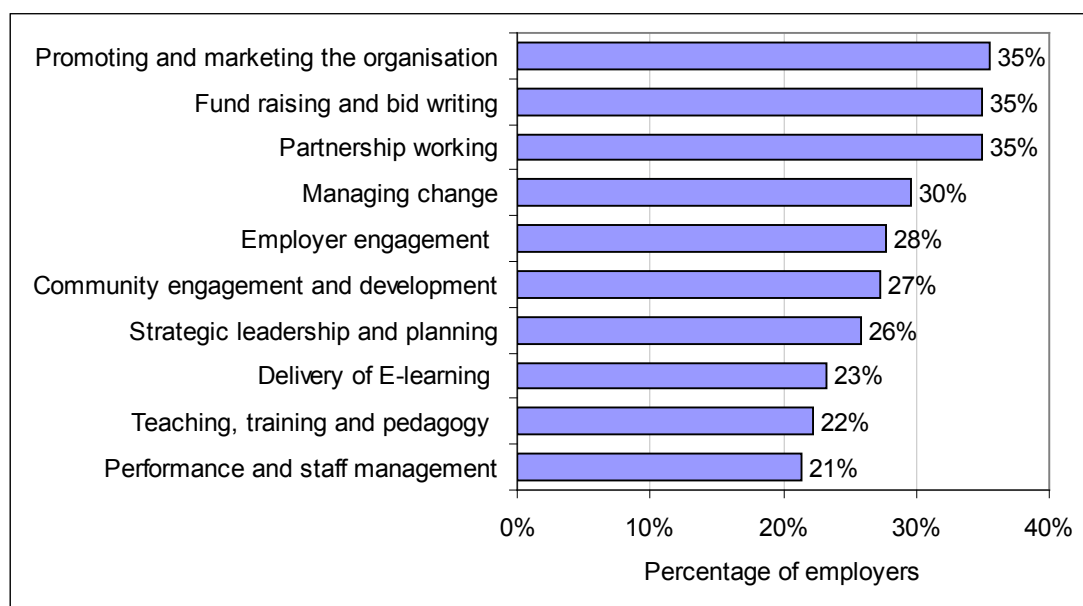
Between 2007 and 2017 in England, it is predicted that there will be an increase in management, professional, associate professional and personal service occupations and a decrease in most other occupations, particularly administrative, skilled trades and elementary occupations.

All the trends mentioned above are very similar to those in the UK in terms of both the lifelong learning and all sectors.

6.2 Future skills

Employers in the lifelong learning sector that participated in the 2010 survey were asked about future skills needs. According to their responses, the top future skills needs are very similar to the skills gaps and include skills such as marketing, management and delivery of e-learning. These are highlighted in the diagram below:

Future Skills



Source: LLUK 2010 SSA survey, base 220

The following future skills were identified through various sources of primary and secondary research:

Multi agency partnership and working skills:

Given the reduction of public funding and the need to make economies of scale and use resources efficiently, collaborative working is an essential way forward. 35 per cent of employers participating in the 2010 SSA survey cited partnership working as a future skill. In order to achieve this, there will be a need for skills of partnership working with multiple organisations. For example:

- *Skills Needs and Training Supply for Career Guidance: a Gap Analysis* (TBR 2009) mentions that within Career Guidance, nextstep providers should work with a range of partners and support agencies, such as training providers and health care professionals, to provide for all the participants' needs, enabling them to overcome their barriers to employment
- Group discussions with FE employers have stressed the need for collaborative working as a response to the agenda dealing with Young People in compulsory and post-compulsory education and training, as it spans organisations traditionally delineated as 'youth' and 'adult' service providers.
- With the closer relationships between FE, HE and local authorities, skills of partnership working will be required in the future

- According to the *Archives in the 21st Century* (HM Government 2009), collaboration between, within or among organisations will allow scope for improvements in the quality of services provided. Examples of partnership working include collaborations with universities to support research and innovation; working together with the creative industries to develop new audiences for both sectors; or community archive partnerships with local authorities that can enrich outreach and audience development opportunities.

Community engagement and development skills:

These skills, which were reported by 27 per cent of employers in LLUK's 2010 SSA survey (see figure above), are seen as important future skills needs as Britain becomes more multi cultural and communities take on more responsibility. A specific example can be found in the National Archive's (TNA) bid to Heritage Lottery Fund in 2009, which mentions future skills relating to building relationships with the local community; identifying potential partners such as community groups; developing opportunities into partnerships and projects which benefit the community; managing volunteers; managing community relationships in the longer term to provide lasting benefits, and continuing impact for both sides of the partnership. Community engagement and development skills are also important for resolving employability issues and are vital for helping the long-term unemployed overcome the social barriers to employment. The SSA survey suggests that community engagement and development is a pertinent future skills need in the community learning and development and libraries, archives and information services sectors.

The need to engage with communities will be intensified further as England, and indeed Britain, becomes more and more multicultural. This will result in the need for future skills of engaging with communities, customers and learners that are diverse in nature, be it their social, linguistic or technological diversity. For example, those that are providing information and guidance in order to signpost learners to advancement opportunities and preparing learners for the world of work may have to have an awareness of diverse cultures as well as being able to do this work using traditional modes of information, advice and guidance as well as using advanced e-technology.

Delivery of e-learning skills:

The digital revolution means that the internet and e-technology are emerging as the new modes by which learning is delivered. In this context, the future will demand that individuals have the skills required for effective teaching and learning in a digital world. It is anticipated that changes in technology will impact across all areas of lifelong learning – from teaching and learning practices, including greater use of social media and virtual learning environments (VLEs) to enhance learning (Ofsted 2009c); to the digitisation and preservation techniques of libraries and archives and information management needs and analysis (LLUK SSA 2009) as well as the use of interactive fora and VLEs to provide information and guidance (*Skills Needs and Training Supply for Career Guidance: a Gap Analysis*, LLUK, UKCES 2009). Almost 39 per cent of employers participating in LLUK's 2010 SSA survey said that they would continuously update staff skills related to new technology in order to keep abreast of future skills needs.

Advanced ICT skills:

More specialist and advanced ICT skills are also classified as a future skills need, especially the management of digital information, web content management and database building. Due to the rapidly expanding digital age,

the need will be for individuals in all sectors to be electronically confident and skilled, in order to be able to undertake a variety of tasks online, including e-learning; customer care; provision of information and advice as well as specialist tasks using software packages, or in relation to programming and data security (LLUK 2010a).

Technician and higher technical skills, particularly in sectors like engineering, scientific research and manufacturing, were highlighted in *Skills for Growth* (BIS 2009c) as being vital for the development of the UK economy. HEIs will have to take a lead role in ensuring that these are delivered.

To achieve this, a vital future skills need relates to strategic and forward thinking leadership (cited by 26 per cent of employers in LLUK's 2010 SSA survey). Skilled leaders who can ensure their workforce are producing high quality products by efficiently using limited resources; 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.

As shown in the table below, a large majority of employers who responded to the 2010 SSA survey stated that they were planning to continuously update staff skills and/or provide CPD to staff based on training needs analysis and training plans in order to deal with future skills issues.

Solutions to future skills needs

	Number of employers	Percentage
Continuously update staff skills	147	67
Provide CPD to staff based on training needs analysis and training plans	121	55
Keep up-to-date with and respond to new legislative and regulatory requirements	103	47
Introduce new working practices	88	40
Continuously update staff skills related to new technology	85	39
Introduce new technologies or equipment	76	35
Develop new products and services	61	28
Acquire funds for workforce development	59	27
Develop a future proofing framework: identifying actions to tackle anticipated skills issues	53	24

Base: 220

Source: Lifelong Learning UK 2010 SSA survey. (Example: 67 per cent of responding employers reported that they will continuously update staff skills to deal with future skills issues).

6.3 Future Scenarios

The future looks promising for much of the lifelong learning sector in England. The government has emphasised the need for new skills and upskilling as important drivers in the recovery. They are pushing for more apprentices across all sectors and at higher levels, and they are promoting and encouraging informal learning. However, for many the short term is not so positive with cutbacks promised in all parts of the public sector. This is likely to hit soft targets such as Libraries and funded Youth services, access to funding for formal learning for adults and access to Higher Education for young people from low income families.

- The next three years may prove to be the most challenging that the sector has faced. The introduction of the new all-age Careers Service will see an emphasis on providing more for less with a likely increase in the use of technology to give people basic guidance with less face to face work. There will be significant training needs relating to the introduction of the new service and a likely emphasis on quality standards, qualification and professionalism.
- Community learning and development will see some parts (such as youth work) reduce in funding and move towards increased use of volunteers whilst other parts related to community development and informal learning will increase.
- FE Colleges may see mergers, increasing numbers of formal and loose partnerships and a push towards bigger units and more shared back office services. Teachers will be expected to make better use of ICT as a means to teach more for less. There will continue to be pressure to work with employers.
- Higher Education will see a move towards charging more for their degrees and thus impacting on the learner population. This may be offset by more outsourcing of delivery in partnership with FE colleges and other partners. Staff will need to be more customer focused to meet the needs of learners and employers. The use of ICT will continue to increase.
- Libraries, Archives and Information Services may be hit hardest seeing closures and reductions. However, the move to open new facilities acting both as a library and community centre will continue, as will the push to expect more from a library in terms of delivering learning, careers advice and other services.
- Work Based Learning will probably see a small decline in numbers over the next three years due to mergers to meet minimum level contract values. Providers will need to improve collaborative working skills, the use of ICT, formal learning input and make better use of assessments. There is also potential for a significant increase in apprenticeships.
- The lifelong learning sector as whole will need to improve management skills including bid writing, contract management, project management and people management.

Section 7: Conclusions and Skills Priorities

Current research undertaken as part of this Sector Skills Assessment ascertains that the skills priorities for England 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

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 England are similar to those identified in 2009 (LLUK 2010a), 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 England 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 England 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



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