

# LIFELONG LEARNING: FURTHER EDUCATION

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This briefing provides a general introduction to lifelong learning in Scotland and focuses specifically on further education. It presents key statistics for the sector, information on the funding of Scotland's colleges and the financial support available for further education students. It also looks at recent developments and key issues facing the Further Education sector.

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## KEY POINTS

- Responsibility for education in Scotland is devolved. The Scottish Executive's Education Directorate is responsible for further and higher education in Scotland
- The Scottish Funding Council (SFC) distributes funding for teaching, research and other activities in Scotland's colleges and Higher Education Institutions. In 2006-07 the SFC was allocated just over £1.5 billion by the Scottish Executive
- Further education generally refers to post 16 education and covers a wide range of courses. In 2005-06 350,079 students studied at the 43 colleges in Scotland. The majority of funding for colleges comes from the SFC
- The level of support available to further education students in Scotland is dependent on a number of factors. Students may be eligible for the following funding: paid tuition fees; ILA Scotland grant; career development loan; educational maintenance allowance; FE bursary maintenance allowance; dependent allowance; study expense allowance; travel expense allowance; additional support needs for learning allowance; child tax credit; childcare fund; and hardship fund
- There are a number of issues and recent developments that may affect further education in Scotland. These include the Review of Scotland's Colleges (RoSCo), to which the Cabinet Secretary for Education and Lifelong Learning will respond in the Autumn
- In addition, the SFC is currently reviewing college and HEI teaching funding methodologies. A consultation was issued in September 2006 and a new set of funding principles were produced. The SFC plans to consult on the proposed principles and changes in 2008
- The new administration has stated their commitment to publishing a new Scottish Skills Strategy. This Strategy will replace the existing Lifelong Learning Strategy. It is due to be published in September 2007. The Scottish National Party Manifesto also stated the intention to review the Modern Apprenticeships programme
- A number of areas for possible consideration in the Scottish Parliament were highlighted in the Enterprise and Culture Committee's legacy paper. These included:
  - a review of funding for part-time students in further and higher education
  - governance in Scotland's further education colleges
  - the forthcoming teaching funding methodology review of the Scottish Funding Council
  - a review of post-graduate numbers in Scotland

# INTRODUCTION

## LIFELONG LEARNING

Lifelong learning is a term used to describe all levels of education and training in both formal and informal settings. It can be delivered in a number of ways, including through further education, higher education, continuing education, distance learning, work based training, and community education (Davies and Wakefield, 2003).

In 2001-02 the Scottish Parliament Enterprise and Lifelong Committee undertook an inquiry into lifelong learning in Scotland. The [Final Report on Lifelong Learning](#) was published in October 2002. Following this inquiry, the Scottish Executive published its lifelong learning strategy for Scotland, [Life Through Learning: Learning Through Life](#) (Scottish Executive, 2003).

The lifelong learning strategy has 5 goals for the people of Scotland. These are:

- people have the confidence, enterprise, knowledge, creativity and skills they need to participate in economic, social and civic life
- people demand and providers deliver a high quality learning experience
- peoples' knowledge and skills are recognised, used and developed to best effect in their workplaces
- people are given the information, guidance and support they need to make effective learning decisions and transitions
- people have the chance to learn, irrespective of their background or current personal circumstances

The previous Scottish Executive (2006a) undertook a consultation, [Lifelong Learning - Building on Success: A Discussion of Specific Issues Related to Lifelong Learning in Scotland](#) which focused on the following themes:

- engagement with employers
- flexible learning opportunities, entitlement and discretionary support
- information, advice and guidance
- community learning and development
- journeys into and through learning

It is envisaged that the Lifelong Learning Strategy will be replaced by a new Skills Strategy. This is discussed later.

This briefing focuses specifically on further education in Scotland. A separate briefing, published in March 2007 (SB07-13), covers skills and adult learning.

## HIGHER AND FURTHER EDUCATION IN SCOTLAND

Responsibility for education in Scotland is devolved. The Scottish Executive's Education Directorate is now responsible for further and higher education. Under the previous administration, this responsibility fell to the Scottish Executive's Enterprise, Transport and Lifelong Learning Department.

### ***The Scottish Funding Council***

The Scottish Executive funds the [Scottish Funding Council](#) (SFC), which is a non-departmental public body (NDPB), set up to distribute funding for teaching, research and other activities in Scotland's colleges and Higher Education Institutions (HEIs). In 2006-07 the SFC was allocated just over £1.5 billion by the Scottish Executive (Scottish Executive, 2006b).

The SFC was established in 2005 under the terms of [The Further and Higher Education \(Scotland\) Act 2005](#). It replaced the Scottish Further Education Funding Council (SFEFC) and the Scottish Higher Education Funding Council (SHEFC). The main roles of the SFC are outlined below (SFC, 2007a):

- develops and implements policies and strategies for teaching and, learning, skills, research and innovation
- allocates public funding to colleges and universities for running costs related to teaching and research, for buildings and equipment – including major capital projects – and for specific initiatives and strategic developments
- regulates as necessary the use of public funding by colleges and universities and their activities so as to safeguard the public interest and promote high standards of governance and administration
- works with the quality assessment agencies (Her Majesty's Inspectorate of Education in the college sector and the Quality Assurance Agency in the university sector) to assess and enhance the quality of learning programmes
- holds Scotland's colleges and universities accountable for delivering the quantity, quality and relevance of further and higher education and research sought by the Scottish government, for achieving best value from public funds, and for managing their financial and other resources in a sustainable way
- collects, evaluates and publishes relevant statistical data and other evidence to enable the Scottish government, the Council, colleges and universities, other interested bodies and the public generally to be better informed about further and higher education and research
- advises Government on matters relating to further and higher education and research.

The SFC's (2007) [Corporate Plan 2006-09](#) has seven main aims and sets out the Council's plans for implementing the strategic priorities for the Council, colleges and universities. These were based on the previous Minister for Enterprise and Lifelong Learning's priorities, which were set out in the Ministerial Strategic Guidance Letter to the Scottish Funding Council (Scottish Executive, 2005a). The aims are:

- Scotland's colleges and universities to offer – within the volume of learning set by Scottish Ministers – fair access to a diverse range of learning programmes suited to individual learners' circumstances
- learning provision and programmes offered by Scotland's colleges and universities to be relevant to students' lives and careers, society and the economy
- all learning provision and programmes offered by colleges and universities to be of high quality
- Scotland's universities to provide a high quality and internationally competitive research base
- Scotland's colleges and universities to generate effective knowledge exchange that stimulates innovation and development in public and private sector organisations and enterprises
- colleges and universities to support Scotland's international ambitions
- Scotland's colleges, universities and Funding Council to be highly effective, world-class organisations

### ***The Scottish Credit and Qualifications Framework***

A range of qualifications are offered by Scotland's colleges and HEIs. [The Scottish Credit and Qualifications Framework](#) (SCQF) sets out the relationships between levels of qualification. It covers the mainstream qualifications offered by the [Scottish Qualifications Authority](#) (SQA), Higher Education Institutes (HEIs) and Scottish Vocational Qualifications (SVQs). The SCQF table of main qualifications can be found in Appendix 1.

In 2006 the European Commission adopted a proposal for the establishment of the [European Qualifications Framework](#) for lifelong learning (EQF). The EQF aims to support the movement of learners across Europe by providing a reference point for comparing qualifications across different education and training systems and to strengthen co-operation and mutual trust between the relevant stakeholders (European Commission, 2006).

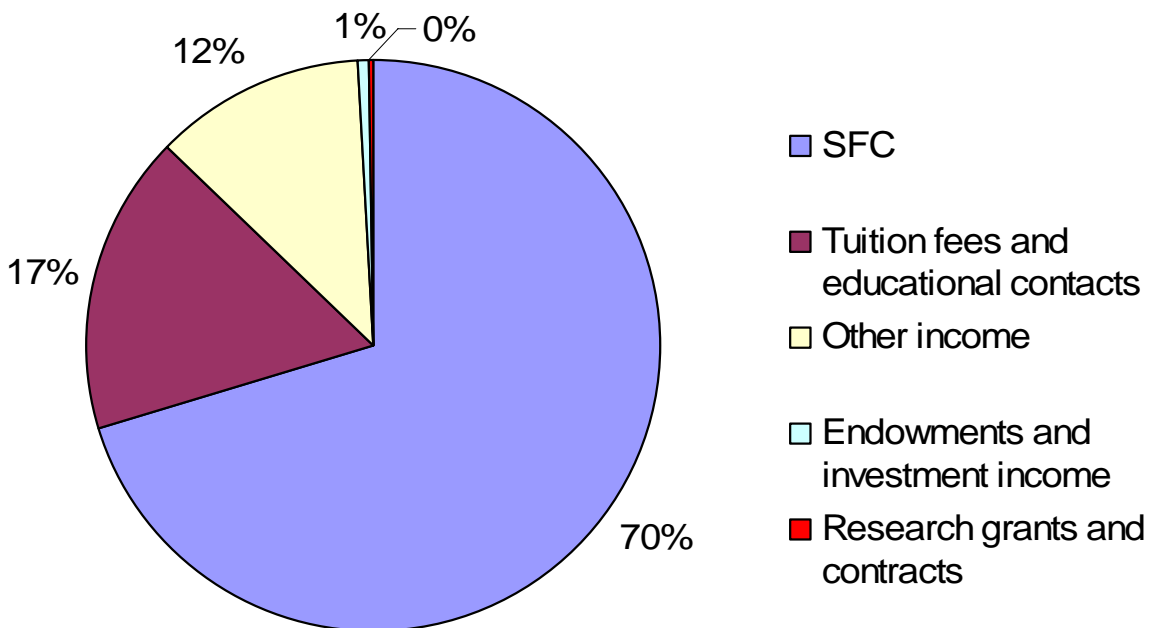
## FURTHER EDUCATION

The term further education generally refers to post-16 education and covers a wide range of courses. There are 43 colleges in Scotland. A list of the colleges can be found in Appendix 2.

### FUNDING FURTHER EDUCATION

Scotland's colleges have five main sources of income. However the majority of funding comes from the Scottish Funding Council (SFC). This is illustrated in Figure 1 below.

**Figure 1: Sources of income for Scotland's colleges, 2004-05**



Source: Scottish Executive (2006c)

In 2004-05 colleges received £397.9 million from the SFC, £96.2 million from tuition fees and education contracts, £67.1 million from other income, £4.1 million from endowments and investment income and £0.9 million from research grants and contracts (Scottish Executive, 2006c).

For the academic year 2007-08, the SFC allocated £528 million (excluding capital funding) to colleges. This breakdown can be seen in table 1 below. Funding is made up of £439.8 million for teaching, £18.5 million for improvement, £69 million for student support and £0.3 million for other grants. The capital funding, for the SFC financial year, is £88 million which is to be used to modernise college estates and promote collaboration between the college and university sectors to deliver sustainable buildings and facilities (SFC 2007a). A more detailed breakdown can be found in Appendix 3.

**Table 1: SFC Funding 2007-08**

	2006-07	2007-08	Change from 2006-07	
	£m	£m	£m	%
<b>Teaching</b>	415.1*	439.8	24.7	6
<b>Improvement</b>	17.8	18.5	0.7	4
<b>Student support</b>	67.2	69.0	1.8	3
<b>Other</b>	0.3	0.3	0	0
<b>Total (excluding capital)</b>	<b>500.4</b>	<b>527.6</b>	<b>27.2</b>	<b>5</b>
<b>Capital (financial year)</b>	88	88	0	0

\*please note this excludes the £9m one-off non-recurring allocation announced in SFC/77/06 (**Source SFC 2007b**)

### **Spending Review**

The SFC is now in the last year of the 2004 Spending Review period, which runs from the financial year ending 31 March 2008. The total financial year resources made available to the college sector will be £615 million by the end of the Spending Review period. The increases over the period have been to:

- Maintain the real terms value of the main teaching grant
- provide for growth of school/college partnerships

The SFC also approved £7 million to address the following priorities:

- not in education, employment or training (NEET) (£3 million)
- skills and employer engagement (£2 million)
- knowledge transfer (£2 million).

The SFC is currently preparing its Spending Review submission to cover the financial years 2008-09 to 2010-11, which will be based on the SFC 2006-09 Corporate Plan (SFC, 2007a).



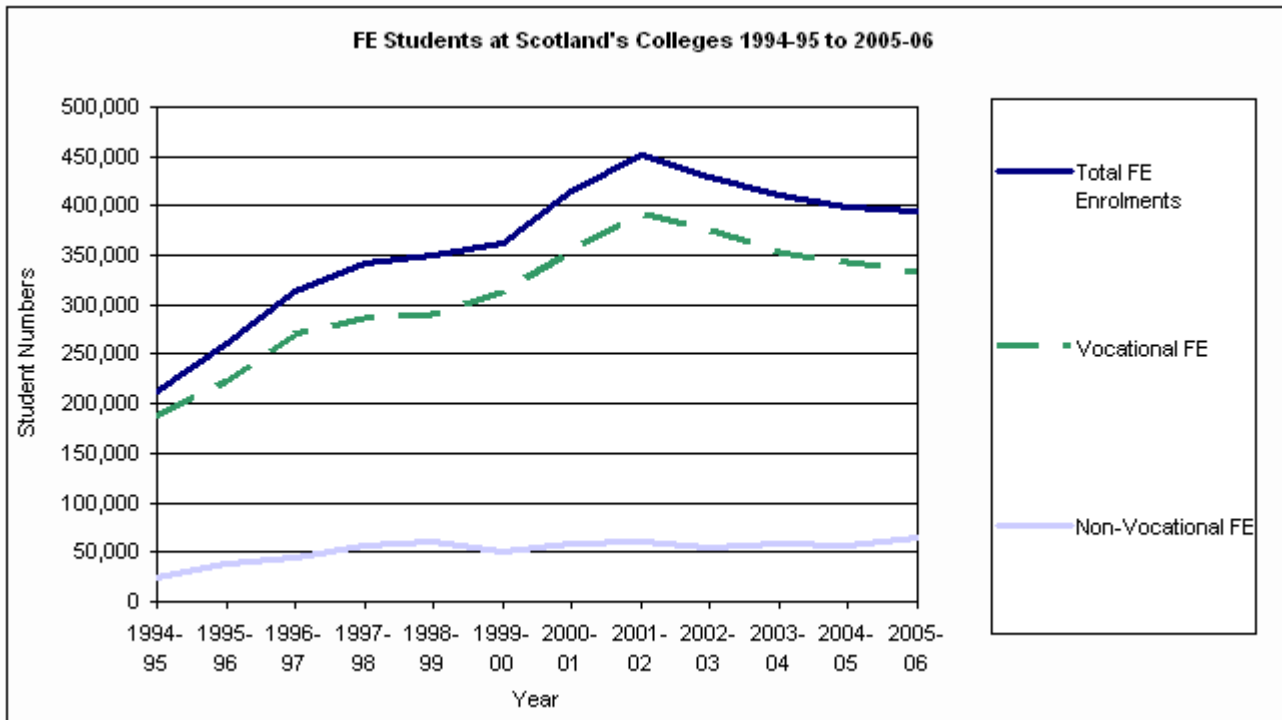
## STUDENTS IN FURTHER EDUCATION

Scotland's colleges provide education at higher education (HE) and further education (FE) level. The number of college enrolments at further education level in Scotland has seen an increase of 87% since 1994-95.

However, since a peak in 2001-02 at 450,790, there has been a steady decline in the number of FE enrolments at Scotland's colleges to 395,660 in 2005-06 (-14% over the period).

As can be seen from figure 2 below, the majority of FE enrolments at Scotland's colleges are for vocational courses. In 2005-06 this accounted for 84% of total FE enrolments.

**Figure 2: FE Enrolments at Scotland's Colleges**



Source: Scottish Funding Council (SFC)

It should be noted here that as it is common for students to enrol on to more than one course in any academic year, so the number of enrolments shown in the figure above is significantly higher than the actual headcount of students.

Table 2 shows the breakdown of the headcount of students by gender and by mode of study in 2004-05. It can be seen from the table that the vast majority of students studying FE course at Scotland's colleges do it part-time (86%). This is the case for both vocational and non-vocational courses. Females account for 57% of the headcount for vocational courses and 64% of the headcount for non-vocational courses.

**Table 2: Headcount of Further Education Students in Scottish Colleges 2004-05**

	Total			Male			Female		
	Total	Full-time	Part-time	Total	Full-time	Part-time	Total	Full-time	Part-time
<b>Total FE</b>	<b>301,695</b>	<b>42,220</b>	<b>259,475</b>	<b>126,525</b>	<b>20,445</b>	<b>106,080</b>	<b>175,175</b>	<b>21,775</b>	<b>153,400</b>
<b>Vocational</b>	<b>263,550</b>	<b>41,905</b>	<b>221,645</b>	<b>112,730</b>	20,275	92,455	<b>150,825</b>	21,630	129,195
<b>Non-Vocational</b>	<b>38,145</b>	<b>315</b>	<b>37,830</b>	<b>13,795</b>	170	13,625	<b>24,350</b>	145	24,205
<b>Headcounts of Students in Scottish Further Education Colleges Overview: 2004-05.</b>									

Source : Scottish Further Education Funding Council (SFEFC)

\* This data represents headcounts of students enrolled on courses at FE Colleges. As individuals commonly enrol on more than one course in an academic year, the number of student headcounts is significantly lower than the number of enrolments.

\*\* Where students enrolled in both a HE and FE course in an academic year they have been counted only as a HE student. Where students enrolled in both a vocational and non-vocational course in an academic year they have been counted only as a vocational student.

\*\*\*\* The data includes students who enrolled without applying for funding to the SFEFC for whom information is not complete. Their headcounts were calculated using a ratio of headcounts enrolments from those students who did apply for funding.

\*\*\*\*\* The totals in this table may differ from totals in other tables due to rounding and the allocation of non-funded students

## FURTHER EDUCATION COURSES

Further education covers a wide range of courses including:

- vocational and general education
- link courses for school children
- industrial pre-employment training
- training for employees
- courses in the workplace
- evening classes (vocational and non-vocational)
- distance learning
- community education
- access courses
- English as a foreign language

(Scottish Executive, 2005b)

In 2005-06 students attending colleges in Scotland were enrolled on 35,923 programmes leading to a range of qualifications (SFC 2007c). Many of the courses offered by colleges are awarded by the [Scottish Qualifications Authority](#) (SQA). SQA is an NDPB in Scotland responsible for the development, accreditation, assessment and certification of qualifications other than degrees.

SQA's functions are to:

- devise, develop and validate qualifications, and keep them under review
- accredit qualifications
- approve education and training establishments as being suitable for training for these qualifications
- arrange for, assist in, and carry out, the assessment of people taking SQA qualifications
- quality assure education and training establishments which offer SQA qualifications
- issue certificates to candidates

The qualifications they accredit include<sup>1</sup>:

- National Qualifications including Standard Grade and National Units and Courses at Access, Intermediate, Higher and Advanced Higher levels
- Higher National Certificates and Diplomas (HNC/HND)
- Scottish Vocational Qualifications (SVQs)
- Customised Awards and Professional Development Awards

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<sup>1</sup> Further information on SQA qualifications can be found in [Scottish Qualifications](#) (SQA, 2006)  
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Table 3 below shows a breakdown of enrolments and activity in colleges for 2005-06 by qualification aim (SFC, 2007c). Activity is measured using SUM (student unit of measurement); one SUM is equivalent to 40 hours of teaching received by a student. It can be seen from the table below that the qualifications that make up the largest proportion of activity in colleges, measured in SUMs, are: **National Units** alone (not leading to any of the other qualifications listed) at 69,821 enrolments and 23.2% of total activity, **Higher National Diplomas (HNDs)** at 16,450 enrolments and 11% of total activity, **other non-advanced certificate/diplomas** or equivalent at 51,473 enrolments and 10.9% of total activity; and **Higher National Certificates (HNCs)** at 20,656 enrolments and 10.4% of total activity

**Table 3: Enrolments and activity by qualification aim in Scotland's Colleges, 2005-06**

Qualification aim	Enrolments	Activity (SUMs)	% of total activity (SUMS)
Degree and above	777	4,121	0.2
Award from professional body	1,014	4,989	0.2
SVQ or NVQ Level 5	58	303	0.0
Diploma (HNC/D level for diplomats and degree holders)	541	3,250	0.2
HND or equivalent	16,450	224,878	11.0
HNC or equivalent	20,656	213,008	10.4
SVQ or NVQ: Level 4	1,637	6,301	0.3
Advanced certificate (bridge to HNC/D)	386	2,872	0.1
Advanced certificate not specified	1,824	4,911	0.2
Advanced diploma not specified elsewhere	1,499	8,236	0.4
Advanced certificate (comprising HN units)	1,408	5,922	0.3
HN units only but not leading to certificate	4,710	10,869	0.5
Highest level of study (programme or unit) Advanced Higher	48	529	0.0
Certificate of sixth year studies (CSYS)	134	134	0.0
SVQ, NVQ or GSVQ/GNVQ Level 3	17,896	152,429	7.5
SVQ, NVQ or GSVQ/GNVQ Level 2	14,820	150,767	7.4
SVQ, NVQ or GSVQ/GNVQ Level 1	2,282	26,911	1.3
Highest level of study (programme or unit) Higher	10,259	106,936	5.2
Highest level of study (programme or unit) Intermediate 2	6,693	69,033	3.4
Highest level of study (programme or unit) Intermediate 1	3,245	16,169	0.8
Highest Level of Study (programme or unit) Access	1,521	13,652	0.7
Other non-advanced certificate/diploma or equivalent	51,473	222,824	10.9
Any other recognised qualification	59,270	143,259	7.0
National units alone, not leading to any qualification listed above	69,821	474,615	23.2
special educational needs programme	16,180	58,391	2.9
Course not leading to recognised qualification (including most non vocational)	142,016	119,348	5.8
<b>Scotland total</b>	<b>446,618[1]</b>	<b>2,044,655</b>	<b>100.0</b>

(Source: SFC 2007c)

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A wide range of subjects are studied at Scotland's colleges. The SFC (2007c) reported that the highest student activity in colleges, for 2005-06, was in family care, personal development, and personal care and appearance. The lowest activity was in oil/mining, and plastics and chemicals. Since 1998-99, subjects such as construction, performing arts, and family care have shown a growth in activity. Others subjects such as business management and office studies, and engineering, have shown a decline in activity.

## FUNDING FOR FURTHER EDUCATION STUDENTS

The level of support available to further education students in Scotland is dependent on a number of factors including income and family circumstances, age, and if the student is studying full-time, part-time or by distance learning (Scottish Executive, 2007e). Table 4 shows the different types of funding available for people studying at colleges by mode of study.

**Table 4: Type of funding available for further education students by mode of study**

Type of funding	Full-time	Part-time	Distance learning
Tuition fees	✓	✓	✓
ILA Scotland	✓	✓	✓
Career Development Loan	✓	✓	✓
Educational Maintenance Allowance	✓		
FE Bursary Maintenance Allowance	✓	✓	
Dependent Allowance	✓	✓	
Study Expense Allowance	✓	✓	✓
Travel Expense Allowance	✓	✓	✓
Additional Support Needs for Learning Allowance	✓	✓	
Child Tax Credit	✓	✓	✓
Childcare Fund	✓	✓	✓
Hardship Fund	✓	✓	✓

Source: Scottish Executive (2007e)

### ***Tuition fees***

Full-time further education students are not required to pay fees provided they meet certain residency requirements<sup>2</sup>. Most students studying part-time and on distance learning programmes will have to pay tuition fees. However, free tuition is available for people who are (or whose family are) in receipt of some benefits or are on a low income. Further information is available in the SFC's [Fee Waiver Grant Policy 2007-08](#) (SFC, 2007d). The purpose of the fee waiver grant is to enable colleges to waive the tuition fees of students on the basis of eligibility and need.

<sup>2</sup> The residency requirements are complex and for individual cases the student may find it useful to contact the college at which they intend to study. Generally the residency requirements are:

- they must be ordinarily resident in Scotland on the first day of the first academic year of the course
- UK nationals must also have been ordinarily resident in the United Kingdom, the Channel Islands or the Isle of Man for the three-year period immediately before the start of the course
- there are different rules for asylum seekers, refugees and EU nationals.

(Scottish Executive, 2007e) Further information on residency requirements can be found in the SFC's Fee Waiver Grant Policy document (SFC, 2007d) and the Education (Graduate Endowment, Student Fees and Support) (Scotland) Amendment Regulations 2006.

## **ILA Scotland**

[ILA Scotland](#) is a Scottish Executive scheme to help people over the age of 18 pay for learning. People who earn less than £15,000 a year or those who are in receipt of some benefits may qualify for up to £200 a year to contribute towards a range of courses. People who earn more than £15,000 a year can get up to £100 towards some computer courses. The previous Scottish Executive announced that this threshold would rise to £18,000 from summer 2007 (Scottish Executive, 2007a).

## **Career Development Loan**

[Career Development Loans](#) (CDLs) are loans between £300 and £8,000 that can be used to help individuals fund up to two years of learning (or three years if the course includes one year of relevant practical work experience). They are available for people over the age of 18 throughout the UK. The loans are currently available from three high street banks, with the interest being paid by the Department for Education and Skills during the course and for up to a month afterwards (DirectGov). The Scottish Executive commissioned research to assess awareness of and demand for CDLs in Scotland. This research found that relative to other sources of funding there was little awareness of CDLs in the general population. It went on to make recommendations for the future of CDLs in Scotland (Scottish Executive, 2006d).

## **Educational Maintenance Allowance**

[Educational Maintenance Allowances](#) (EMAs) provide financial support for young people from low income families who undertake a full-time course at school or college. EMAs were introduced across Scotland from August 2004 for 16 year olds. In 2005-06 eligibility was extended to include 17 year olds and this is to be raised to include 18 and 19 year olds in 2007-08 (EMA Scotland). Table 5 shows the income thresholds, and weekly payments for 2006-07.

**Table 5: Income thresholds and weekly EMA payments for 2006-07**

<b>Income threshold</b>	<b>Weekly allowance term time*</b>
£0 - £20,817	£30
£20,818 - £25,521	£20
£25,522 - £30,810	£10
£30,810 or more	£0

\*Two bonuses of £150 are available if the student remains on their course and makes good progress with learning.

Source: EMA Scotland

In 2005-06 36,460 students in Scotland received EMA payments, 80% received the maximum weekly payment of £30 (Scottish Executive, 2006e).

The SFC intends to pay around £12 million to colleges in 2007-08 to cover EMA activity (SFC, Education maintenance allowances 2007-08).

In July 2007, an external research report was published by the Scottish Executive entitled [Young People's Awareness and Experience of Educational Maintenance Allowances \(EMAs\)](#). The aim of the research was to gather evidence of young people's awareness and experience of the EMA, to assess the impact on young people's choices and pathways, and to assess if EMAs

help to prevent young people from becoming Not in Employment, Education or Training (NEET). The report's main findings are provided below:

- A range of **promotional activities** were used to raise awareness of the EMA amongst school pupils. These varied as a result of the financial and human resources that were available and the existence of local promotional opportunities
- The **EMA conditions were applied differently** between EAs, within schools in the same EA and between FE Colleges, due to a range of factors like different monitoring systems, the amount of control exhibited by the EA, the levels of discretion in schools and the interpretation of Scottish Executive Guidance
- **EMA awareness and understanding** was poor amongst 14/15 year olds. Awareness was normally as a result of being involved in the research or knowing friends of family members in receipt of the EMA. The majority of 14/15 year olds involved in the research could not be considered 'at risk' of becoming NEET, most had aspirations to go to university, college or some form of training. For those who did not have clear plans, a financial incentive like the EMA was considered an influential factor
- The majority of **EMA recipients** were studying Highers and had planned to stay on at school, regardless of the financial allowance. The payments gave recipients greater financial independence, less need to work part time and provided them with more time to study. It did mean that the majority of these pupils did not experience the positive benefits of part time work. The EMA was predominantly spent on personal items and activities. There was no stigma attached to receiving the EMA
- There were **mixed views about the effect of the EMA**. Some pupils felt that the weekly allowance helped them to attend more regularly and increased their punctuality and some felt that working towards the bonus motivated them to study harder
- **College students** tended to place greater importance on the influence of the EMA on their post-16 choices. These students also used the EMA to meet study and travel costs or contribute to general household income and expenditure
- **Parental advice/expectation** along with career or HE aspirations were the key influencers in post-16 pathways. These were always interconnected with other factors like educational ability, school experience and specific course requirements. Less influential, but still identifiable considerations were: uncertainty and indecision which led to maintaining the status quo, readiness to move into a different learning or working environment and the EMA
- The EMA had some less positive effects, mainly the administrative workload attached to it, a sense of unfairness that existed amongst non- EMA recipients and in some cases it encouraged a small group of young people to stay on at school when alternative EET routes were more appropriate
- A number of **positive EMA effects** were identified, including the improvement in the attendance and punctuality of some young people, increased retention in colleges, increased personal responsibility of young people and important financial support for college students
- EMAs seemed to provide financial incentive to those students who do not need to be encouraged to stay on in education. The **EMA was not an influential factor** for the majority of young people in this study. However, the involvement of a low number of pupils at risk of becoming NEET has meant that the research has found limited evidence to ascertain whether the EMA is having an impact on preventing young people in Scotland from becoming NEET

**(Scottish Executive, 2007f).**

## **Further Education Bursaries**

The bursaries budget for 2007-08 has been set at £56.070 million. Information on the allocation to individual colleges can be found in [2007-08 Main Grant Letter: Allocation of Main Grants to Colleges](#) (SFC, 2007b).

Each college calculates the level of award for each eligible student. The award can be made up of the following allowances:

- maintenance allowance
- dependant allowance
- study expense allowance
- travel expense allowance
- additional support needs for learning allowance

Information on the eligibility criteria and how awards are calculated can be found in the [National Policy for Further Education Bursaries 2007-08](#) (SFC, 2007e).

### *Maintenance Allowance*

A maintenance allowance of £84.69 is available to full-time students depending on age, family circumstances and income (SFC, 2007e).

### *Dependant Allowance*

Full-time students can receive an allowance of £48.27 per week if they have care, financial or legal responsibilities for an adult dependant (whose income is lower than £48.27) (SFC, 2007e).

### *Study Expense Allowance*

This allowance can be used to fund study expenses that are essential for the course such as specific clothing and tools, items required for health and safety reasons and mandatory study trips (SFC, 2007e).

### *Travel Expense Allowance*

Students who live more than one mile away from the college may be able to claim a travel expense allowance. Additional funding may be available for students with dependent children and those with additional support needs (SFC, 2007e).

### *Additional Support Needs for Learning Allowance*

Additional support towards travel and study costs can be offered to disabled students who incur additional costs because of their disability (SFC, 2007e)

In 2005-06 37,067 students were assisted from the bursary fund. Table 6 below shows the number of students claiming each type of bursary support and the total amount paid for each allowance.



**Table 6: Students assisted from the bursary fund, 2005-06**

Type of allowance	Students assisted	Expenditure (£)	Average award per student (£)
Maintenance Allowances	18,093	33,410,528	1,847
Residence Costs	283	501,415	1,772
Dependants Allowance	44	52,281	1,188
Study Allowance	31,378	4,759,494	152
Travel Expenses	28,561	9,984,544	350
Alternative Travel Expenses	2,469	1,120,889	454
Special Educational Needs Allowances	2,691	2,602,170	967
<b>Total</b>	<b>37,067</b>	<b>52,431,321</b>	<b>1,415</b>

(Source: SFC 2007c)

### **Child Tax Credit**

Child Tax Credit is an allowance for parents and carers of children or young people who are in full-time non advanced education or approved training. Families with children can claim Child Tax Credit if their income is less than £58,175 a year (up to £66,350 for children under one) (DirectGov: Child Tax Credit).

### **Childcare Fund**

Colleges have a childcare fund, allocated by the SFC, which is used to pay for registered childcare (Scottish Executive, 2006d). The priority for this fund is to meet the needs of mature students, loan parents and students studying full-time. In 2007-08 the SFC allocated £7.1 million to the Further Education Childcare Fund (SFC, 2007a).

### **Hardship Fund**

The Further Education Hardship Fund is also allocated by the SFC. This fund is for emergency use. Colleges can use the fund to provide financial assistance to students who, without support, may not be able to access or continue in further education, or for students who face financial difficulties (SFC, 2007f). The Further Education Hardship Fund budget for 2007-08 was set at £5.9 million (SFC, 2007a)

### **Adult Education Allowances Scheme**

Scottish students attending a college of adult education in the United Kingdom may be eligible for the [Adult Education Allowances Scheme](#). Under this scheme, as well as having their tuition fees paid, students can receive an income assessed maintenance grant and other supplementary grants if eligible. [Newbattle Abbey College](#) runs eligible courses, as do several other colleges in the UK (Student Awards Agency Scotland).

## OTHER RELATED SCOTTISH EXECUTIVE POLICIES

### ***Not in Education Employment or Training***

In 2006 the Scottish Executive announced its strategy, [More Choices, More Chances](#), which aims to reduce the proportion of young people (16 to 19 year olds) who are not in education, employment or training (NEET) (Scottish Executive, 2006h).

In January 2007 the SFC agreed to allocate £3 million to colleges in 2007-08 to assist in implementing the Scottish Executive's NEET strategy (SFC, 2007g). This £3 million forms part of the overall teaching budget for 2007-08 of £415,047 million. It will be used to work with colleges, universities and others to reduce the barriers to enrolment and progression in learning. In particular, one of the action points of the SFC's corporate plan states that it will implement the 'Learning for All' action plan, by prioritising the problems faced by the most deprived areas and building the demand for learning among disadvantaged groups.

In July 2007, the SFC agreed to target the funding at colleges serving the seven areas facing the greatest NEET challenges. These are: Glasgow City, North Ayrshire, Dundee City, East Ayrshire, West Dunbartonshire, Clackmannanshire and Inverclyde.

### ***Professional Development of Lecturers***

The Scottish Executive has overall policy responsibility for the professional development of college lecturers in Scotland. It oversees the [Professional Development Forum](#) which aims to:

*“facilitate and enhance the training and continuing professional development of further education lecturers in Scotland through the approval of the provision of high quality units of initial teacher training and continuing professional development which meet the needs of the individual and the profession”* (Professional Development Forum).

In 2006 the Scottish Executive published the new [Professional Standards for Lecturers in Scotland's Colleges](#) (Scottish Executive, 2006g).

### ***Students with Additional Support Needs***

In 2005 the Scottish Executive published [Partnership Matters](#) (Scottish Executive, 2005). This guidance document defines the roles and responsibilities of the agencies involved in supporting young people with additional needs to attend further education. It also encourages partnership working between agencies.

### ***Schools and College Partnerships***

[Lifelong Partners](#) is the previous Scottish Executive's strategy to develop effective partnerships between schools and colleges (Scottish Executive, 2005). The rationale for these partnerships is to enable colleges to help schools in their task of developing the capacities of young people (Scottish Executive School and College Partnerships).

Skills for Work courses are mainly delivered through school and college partnerships (Scottish Executive, 2006f). These courses have been piloted between 2005 and 2007. The courses aim to enable young people from S3 onward to develop practical vocational skills and to improve their employment prospects. The courses are in subjects including construction crafts, sport and recreation, early education skills and childcare, financial services, hairdressing, and rural skills. Courses in engineering skills, hospitality, and health and social care will also run in 2007 (Learning Teaching Scotland). An [interim report](#) of an evaluation of the Skills for Work pilots was

published in July 2007, with the full evaluation of the pilots due to be published in late 2007 or early 2008 (Scottish Executive 2007g).

The SFC has an additional £18.8 million available in 2007/08 for school/college partnerships, on top of the existing resources already allocated to these partnership activities. "Lifelong Partners" indicates that the purpose of this funding is to support:

- an increase in college activity for pupils, including fee waiver grants for pupils
- training and development
- enhanced careers advice.

[Lifelong Partners - a guide for schools, colleges and local authorities](#) states that local authorities are currently a source of funding for partnership activity, in terms of the funding of some courses, but more commonly in respect of other costs. Over and above the SFC's funded college places for pupils, education authorities currently have the option to fund additional college courses for pupils in their area if that is their local priority (and the college concerned is able and willing to meet this demand).

This is the last year of the three-year commitment by the Scottish Executive to invest in school/college partnership. However, the SFC states in its main circular grant letter that it is expected that school/college links will continue to be a priority in the next Spending Review period.

### ***English for Speakers of Other Languages (ESOL) Strategy***

The Scottish Executive's ESOL strategy was announced on 28 March 2007. The strategy intends to reduce pressures caused by the enlargement of the European Union by creating an additional 4,000 classroom places, either for existing ESOL courses/classes or for provision of new ESOL courses/classes that colleges have identified a demand for. This is supported by funding of £5 million over the next year, of which £2.7 million has been allocated to the SFC to provide additional ESOL places at colleges. The rest of the funding has been allocated to Learning Connections and to a central fund held by the Scottish Executive (SFC 2007g).

### **OTHER ORGANISATIONS AND ASSOCIATIONS**

The [Association of Scotland's Colleges](#) (ASC) is the policy and representative voice for Scotland's colleges. The ASC's strategy has three main areas of activity:

- influence and representation
- integration of Scotland's colleges
- information and support to members

These areas of activity are supported by four aims:

- to influence decision makers in Scotland, the UK and Europe to the benefit of the college sector, its students and other customers
- to work with partners to improve sector resources
- to bring colleges together to gather views and formulate policy
- to support college decision makers

The [Scottish Further Education Unit](#) (SFEU) is a development agency for Scotland's colleges. It is a not-for-profit organisation which offers a range of services to colleges and staff including:

- advice, research and development, consultancy and customised problem solving
- professional and organisation development and training
- conferences, workshops and seminars
- publishing services

[COLEG](#) (Colleges Open Learning Exchange Group) provides learning materials for use by Scotland's further education colleges. It is a self-funding association of colleges.

## ISSUES AND RECENT DEVELOPMENTS

### ***The Review of Scotland's Colleges***

The [Review of Scotland's Colleges](#) (RoSCo) was announced by the Deputy First Minister and Minister for Enterprise and Lifelong Learning in June 2005. The review carried out a detailed examination of how Scotland's colleges currently support Scotland's economic and social well-being, and the future of this sector's role. To inform the review, four working groups were established. A Core Group was also established to oversee the work groups. Specifically, the working groups focused on:

- accountability and governance
- the difference colleges make
- staffing, learners and learning environments
- colleges' long-term strategic future

(Source: Scottish Executive)

The outcome of this review resulted in around 100 recommendations, summarised in the report by the Review's Core Group '[Transforming Lives, Transforming Scotland](#)'. At a Ministerial briefing session, in March 2007, the chair of the Core Group and the chair of each of the working groups outlined the emerging conclusions and recommendations from the review (Scottish Executive, 2007b). Summaries of these recommendations are below:

The [Accountability and Governance Working Group](#) recommendations are aimed at enhancing the capability of board members, including more robust induction and ongoing training and development in areas such as financial management, risk assessment, succession planning better dissemination of good practice. It also examined measures for evaluating the performance of board members. Other areas include looking at the way the SFC oversees colleges in difficulties and learning lessons from difficulties elsewhere in the sector. A research report [Review of Scotland's Colleges: Accountability and Governance](#) (Scottish Executive, 2007c) was published in February 2007.

The [Difference Colleges Make Working Group](#) published their report [Unlocking Opportunity](#) in October 2006. This report provides an overview of the varied work of colleges in order to enable others to gain a "better understanding of the breadth of colleges' activities and the difference that they make" (Scottish Executive, 2006c). It also produced a study that placed a monetary value on the economic benefit of Scotland's college sector.

The Group's second report 'Delivering a Smarter Scotland' presented 12 outcomes where Scotland's colleges can work with partners to make a contribution to Scotland's economy. In addition, it also identified financial pressures that could inhibit colleges' future input, and suggested that additional funding may be required to achieve the outcomes proposed.

The [Staffing, Learners and Learning Environments Working Group](#), as the title suggests, examined the roles and importance of these three factors to successful learning. Significant additional funding requirements were identified to support initial training of lecturers, the continuous professional development needs of college staff and capital investments. The group also identified ways in which student representation and learner engagement could be further supported (Scottish Executive, 2007b).

The [Colleges' Long-Term Strategic Future Working Group](#) stated that colleges, the Scottish Executive and the SFC should aspire to make colleges the provider of choice for vocational training and should be strategic partners in their communities. They also highlighted the importance of modernising learning and teaching methods.

These reports were launched in June 2007, and are expected to help inform the delivery of the Scottish Executive's strategic priorities and the forthcoming spending review. It is expected that the Cabinet Secretary for Education and Lifelong Learning will respond to the review in the autumn of 2007.

### ***SFC's Review of College and HEI Funding Methodologies***

The SFC is currently reviewing of the effectiveness and fitness for purpose of its teaching funding methodologies (SFC 2007i). A consultation was issued in September 2006 and a set of funding principles that underpin the review were produced. An Advisory Group has been established and the SFC plans to consult on proposed changes during 2008 (SFC, 2007i).

### ***The Leitch Review and the Scottish Skills Strategy***

On 5 December 2006, Lord Leitch published his final report into UK skills '[Prosperity for All in the Global Economy - World Class Skills](#)' which set out several recommendations, aiming for the UK to become a world leader in skills by 2020, in the upper quartile of OECD surveyed countries. One of the proposals was to set up a new UK Commission for Employment and Skills. A summary of these recommendations is below (Sector Skills Development Agency, 2007)

- Strengthen employer voice and rationalise existing bodies. Create a new UK Commission for Employment and Skills, accountable to Government and the devolved administrations
- Reform and empower Sector Skills Councils, with an emphasis on the Sector Skills Agreement process. Allow public funding only for vocational qualifications approved by SSCs.
- Expand Skills brokerage services
- Increase adult skills across all levels and all ages
- Route all adult vocational skills funding through Train to Gain and Learner Accounts by 2010. Streamline the role of the Learning and Skills Council
- Improve higher level skills. Change targets and funding to encourage employer/university collaboration

- Extend Train to Gain to higher levels and double apprenticeship volumes
- Launch new 'pledge' for employers to commit to train all eligible employees up to level 2. If the improvement is insufficient by 2010, introduce an entitlement to workplace training in consultation with employers and unions
- Develop a new universal adult careers service
- Create a new integrated employment and skills system to increase sustainable employment and progression
- Develop a nationwide network of local employment and skills boards to ensure local services meet employers' needs and that workers are equipped to access work

The Cabinet Secretary for Education and Lifelong Learning announced on 9 June that the Scottish Executive would develop a Skills Strategy for Scotland that would be ready within the first 100 days of the new administration.

The Scottish Skills Strategy is currently being developed by the Scottish Executive, taking into account the Leitch Review, the UK Government's response ['World Class Skills: Implementing the Leitch Review of Skills in England'](#) (Department for Innovation, University and Skills, 2007) and the evidence from the Scottish Executive Lifelong Learning Strategy Consultation, which was completed in February 2007. The Strategy is currently due to be published in early September 2007. It is intended that it will replace the previous administration's Lifelong Learning Strategy and also act as a response to the Leitch review. It should be noted though that some of the Leitch recommendations listed above are aimed at reforming the English system and the specifics may not apply to the Scottish context, although the principles underlying the review do.

The Skills Strategy will be very broad-ranging, covering education and learning systems from early years to adulthood, setting out what Ministers want to achieve, with priorities and options. After the draft Strategy has been published in September, stakeholders will be consulted on how the Strategy can best be implemented (Scottish Executive, 2007).

### ***The New Administration***

The [SNP Manifesto](#) (Scottish National Party 2007) made several pledges in relation to further education/colleges. These are outlined below:

- To deliver a return to free education
- To provide opportunities to all young people to experience vocational education by expanding school-college partnerships for 14-16 year olds.
- To review the situation with part-time and post graduate students and support efforts to attract more international students
- To review the Modern Apprenticeship programme, aiming to increase the number of small businesses taking part and in the long term relaxing the age restrictions on the programme to benefit older workers.

In addition to the SNP Manifesto, the SNP published the document ['It's Time to Look Forward: The First 100 Days of an SNP Government'](#) (Scottish National Party 2007a) This document stated that:

- By the end of 2007, proposals would be set out to allow pupils who wish to, to be able to pursue vocational opportunities from S3 onwards.

## **ENTERPRISE AND CULTURE COMMITTEE LEGACY PAPER**

As part of its legacy paper the Scottish Parliament Enterprise and Culture Committee (2007) highlighted a number of areas the new Committee(s) may wish to consider as part of their early work programme. Regarding further education the Committee suggested:

- a review of funding for part-time students in further and higher education
- a review of funding more generally
- governance in Scotland's further education colleges
- considering the forthcoming teaching funding methodology review of the Scottish Funding Council
- post-legislative scrutiny of the Further and Higher Education (Scotland) Act 2005
- a Skills Summit to be held as part of the Business in the Parliament event

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## APPENDICES

### APPENDIX 1: SCQF TABLE OF MAIN QUALIFICATIONS

SCQF level	SQA National Units, Courses and Group Awards	Higher Education	Scottish Vocational Qualifications
12		Doctorates	
11		Masters	SVQ 5
10		Honours Degree Graduate Diploma/Certificate*	
9		Ordinary Degree Graduate Diploma/Certificate*	
8		Higher National Diploma Diploma in Higher Education	SVQ 4
7	Advanced Higher	Higher National Certificate Certificate in Higher Education	
6	Higher		SVQ 3
5	Intermediate 2 Credit Standard Grade		SVQ 2
4	Intermediate 1 General Standard Grade		SVQ 1
3	Access 3 Foundation Standard Grade		
2	Access 2		
1	Access 1		

\* These qualifications are differentiated by volume of outcomes and may be offered at either level

Source: SCQF

## **APPENDIX 2: LIST OF COLLEGES IN SCOTLAND**

[Aberdeen College](#)  
[Angus College](#)  
[Adam Smith College](#)  
[Anniesland College](#)  
[Ayr College](#)  
[Banff and Buchan College of Further Education](#)  
[Barony College](#)  
[Borders College](#)  
[Cardonald College](#)  
[Central College of Commerce](#)  
[Clydebank College](#)  
[Coatbridge College](#)  
[Cumbernauld College](#)  
[Dumfries and Galloway College](#)  
[Dundee College](#)  
[Edinburgh's Telford College](#)  
[Elmwood College](#)  
[Forth Valley College](#)  
[Glasgow College of Nautical Studies](#)  
[Glasgow Metropolitan College](#)  
[Inverness College](#)  
[James Watt College of Further and Higher Education](#)  
[Jewel and Esk Valley College](#)  
[John Wheatley College](#)  
[Kilmarnock College](#)  
[Langside College](#)  
[Lauder College](#)  
[Lews Castle College](#)  
[Moray College](#)  
[Motherwell College](#)  
[Newbattle Abbey College](#)  
[North Glasgow College](#)  
[North Highland College](#)  
[Oatridge Agricultural College](#)  
[Orkney College](#)  
[Perth College](#)  
[Reid Kerr College](#)  
[Sabhal Mòr Ostaig](#)  
[Shetland College of Further Education](#)  
[South Lanarkshire College](#)  
[Stevenson College](#)  
[Stow College](#)  
[West Lothian College](#)

Source: SFC

### APPENDIX 3: SUMMARY OF THE SFC BUDGETS FOR FURTHER EDUCATION 2007-08 (£'000S)

<b>Teaching</b>	
Net core activity grant <sup>1</sup>	372,519
Fee waiver	51,404
NEET <sup>2</sup>	3,000
Skills and employer engagement	2,000
Knowledge Transfer	2,000
Scottish Teachers' superannuation scheme <sup>3</sup>	4,669
Strategic growth	4,221
<b>Total</b>	<b>439,812</b>
<b>Improvement</b>	
Quality enhancement <sup>4</sup>	9,215
Access and participation <sup>5</sup>	3,088
Skills and employability <sup>6</sup>	2,500
Strategic development grant (see note 6 below)	1,181
Mergers and collaboration (see note 6 below)	1,000
Procurement activities	500
International	300
College governance leadership and management development	550
FE development directorate	180
<b>Total</b>	<b>18,514</b>
<b>Student Support</b>	
Bursary	56,070
Further education hardship fund (FEHF) and childcare fund (CCF) <sup>7</sup>	12,970
<b>Total</b>	<b>69,040</b>
<b>Other grants</b>	
Chief Executive's discretionary fund	250
Audit Scotland fee	30
<b>Total</b>	<b>280</b>

1. £13.8m school college funds for 2006-07 are embedded in the net core activity grant and fee waiver budgets.

2. Not in Education, Employment or Training

3. 25% of the 2005-06 budget is being embedded into the main unit of resource each year until AY 2009-10.

4. This includes the following budget lines: ICT, Quality, HN review, HMle and SFEU

5. This includes the following budget lines: Beattie, BRITE and widening participation. Similar to previous years, part of the Beattie and BRITE budget is being paid out formulaically (see table E1)

6. Strategic development grants have re-categorised in 2007-08 to show skills and employability, and mergers and collaboration separately. The balance remaining in the strategic development grant relates to legacy costs of projects already in progress.

7. The 2006-07 allocation does not include transitional funds of £66,217 allocated in the 2006-07 AY with regard to changes in the FE Hardship Fund allocation. Please note that the asylum seeker allocation within the FEHF allocation is not inflated.

Source: SFC (2007a)