



Evaluation of the Skills Account Trials

Universal, IES and Level 3 Trials

Richard Boniface
Gareth Wilson
Peter Byram
Graham Whalley
Phil Lucas
Laura Adams
Liz McMichael
Nonihal Kandola
Mohammad Naeem Kazi
David Carter
Stacy McMullen

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RCU Market Research Service Tel: 01772 885999 Fax: 01772 887336

E-mail : enquiries@rcu.co.uk, Web: www.rcu.co.uk

09.122 Report



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Buckingham House
Glovers Court
Preston, PR1 3LS

Tel : 01772 885999 Fax : 01772 887336

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Executive Summary

This report builds on the earlier telephone surveys of skills account holders (*Skills Account Holder Telephone Survey*¹) and provides an initial evaluation of specific aspects of the skills accounts trials. In particular the report focuses on the universal offer, the Integrated Employment and Skills (IES) trial implemented in the West Midlands and the Level 3 trial carried out in the South East and East Midlands.

This report provides an insight into the use of skills accounts within these three different contexts, comparing the use of skills accounts for all adults, those who may have low level skills and are unemployed and those who are taking or planning to take a course at Level 3.

The research was conducted between June 2009 and January 2010 and includes findings from a large telephone survey of skills account holders, focus groups with learners, interviews with providers and other stakeholders and analysis of the skills account database. The key findings from the research are listed below. This is followed by a list of recommendations.

The skills account website underwent a major update during November 2009. The majority of the telephone survey respondents first accessed the website prior to this date and so quantitative findings predominately relate to the previous version of the website. Research activity within the IES trials also took place prior to the launch of the new website.

The evaluation was commissioned by the LSC, which ceased to exist on 31 March 2010. In future the work undertaken by the LSC will fall under the remit of its successor body, the Skills Funding Agency.

Universal Offer

The universal skills account offer is targeted at all adults within a trial region. In 2008/09 the universal offer was available in the South East and East Midlands regions, through 20 Strategic Learning Providers², the **nextstep** service and the Careers Advice Service helpline. During 2009/10 the universal offer is being rolled-out across all 9 regions. The key findings listed below are derived from the quantitative telephone survey unless stated otherwise.

¹ Evaluation of the Skills Account Trials - Skills Account Holder Telephone Survey (LSC 2009) LSC-P-NAT-090179. The survey was based on 900 interviews carried out in June and September 2009.

² Strategic Learning Providers are providers that have specific responsibility for promoting and offering skills accounts, capturing customer details, responding to learner enquiries and providing the LSC with monthly data returns.



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Key Findings

- The percentage of individuals who thought that skills accounts were a good idea remains very high at 94% (up from 93% in the previous survey). 70% thought that skills accounts were helpful for *them personally* (as opposed to the general concept of skills accounts being a good idea).
- Overall satisfaction with the skills account service is similar to the previous survey and remains high (66% of respondents were very satisfied or fairly satisfied in both surveys).
- The percentage of individuals who thought that skills accounts were very easy to use or easy to use has remained unchanged at around 89%.
- The percentage of respondents who felt that they had a *choice of different learning providers* was higher amongst skills account holders (53%) than amongst non-skills account holders (43%).
- Over three quarters of survey respondents thought that including traffic light ratings on the quality of courses, customer satisfaction and the provider's record of getting learners into jobs, within a skills account, would have an important impact on their decisions about choosing a course or provider.
- Frequent users of skills accounts (those who have accessed their account three or more times since signing up) are more aware than occasional users (those who have accessed their account once or twice since signing up) of the Government contribution towards the cost of learning (70% compared to 64%). However, frequent users in the survey were less willing to invest their own money in learning than occasional users (51% compared to 56%). This may be because frequent users are more likely to be young adults, who may have less spare cash. Alternatively, a higher proportion of frequent users may be planning to take a course or change their career in the near future and this may have an impact on their current financial position.
- 53% of frequent skills account users have told someone else about skills accounts compared to 39% of occasional users. Frequent users are more likely to be satisfied with the skills account service than occasional users (85% compared to 82%).
- The overall usage of the skills account website is fairly low, with over 30% of individuals with an activate account unable to recall using it. Of those that can recall using the website, more than half never return after their first visit.
- A follow up survey of skills account holders, who were first contacted in the summer of 2009, also shows that a high proportion of individuals do not continue to use their skills account.
- When individuals visit the skills account website for the first time they need to gain a very clear appreciation of how a skills account is going to benefit them personally. If this is not apparent they are less likely to return.



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- However, even when the benefits are clear, frequent use of the site is much more likely to occur at particular times – typically when an individual is actively looking for a new course.
- The likelihood of frequent use of the skills account website is also increased if the individual had help activating their account in the first place. 52% of skills account users who received help in activating their account became frequent users (accessing their account three or more times), compared to only 42% of those who did not receive help.
- Frequent users are more likely to be satisfied with their course or training than occasional users (98% compared to 92%)
- Older adults are less satisfied with the skills account service than younger adults. For example whilst 72% of 18-24 year old users that we spoke to were *satisfied* or *very satisfied* with the skills account service, only 64% of 45-54 year old users were *satisfied* or *very satisfied*. This seems to be partly due to less experience and/or confidence with IT. A more significant factor, however, is that older adults are less likely to be planning to take a course in the near future, so perceive that a skills account has less relevance for them.
- The majority of the telephone survey respondents first registered for a skills account prior to the release of the new website in November 2009. Initial feedback on the new website therefore came from focus groups with learners. Focus group participants in general liked the new website and thought that the ‘wheel image’ made the site easier to navigate.
- A number of focus group participants thought that the addition of video clips could provide practical examples showing how the website should be used.

IES Trial

The West Midlands region was one of the first areas to pilot the Integrated Employment and Skills (IES) initiative. The aim of the IES trial is to build on the current welfare and skills systems so that all of those out of work get the integrated help they need to address their skills needs, find employment and progress in work through continued training.

A component of the IES initiative is the Employability Skills Programme (ESP) which is an ESF (European Social Fund) co-funded programme aimed at adults aged 18+ and provides employability training for 20 hours per week for up to 15 weeks. The provision has been designed to offer unemployed adults the opportunity to achieve an employability qualification that develops all areas of returning to employment. The programme includes activities to enhance employability skills, opportunities to update knowledge and understanding of the local labour market, opportunities to update job search skills and personalised literacy, language and numeracy support.



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In the West Midlands region it was decided to incorporate the introduction of skills accounts into the ESP and during the programme learners would be given the opportunity to open a skills account. This evaluation is focused on the effectiveness of integrating the skills accounts into the ESP. It is not evaluating the effectiveness of the joint LSC and Jobcentre Plus IES trials (this will be part of future evaluation activity).

The research took place during the summer of 2009 (prior to the launch of the new website in November 2009) and included face to face interviews with nine of the ten contracted IES providers participating in the ESP in the West Midlands. To gather the views of learners a focus group was held with learners at one of the providers. The focus group tested the relevance, appropriateness and usability of skills accounts for this particular client group. Learners who opened a skills account through the ESP were also part of the general skills account telephone survey. The key findings listed below are based on the qualitative research evidence.

Key Findings

- The content of the website lends itself very well for use during group exercises and the content contributes directly to the requirements of the employability award. Embedding the use of the skills account website into the ESP programme enables learners to become familiar with the site, the facilities it contains and how it can help beyond the period of the ESP course. This type of approach is something that could be integrated into a wider range of courses particularly at Entry Level and Level 1.
- The skills and interests assessment were particularly useful for tutors during job search sessions. Providers reported that the results of the skills and interest assessment produced results that surprised the learner. The range of potential careers was much wider than the traditional jobs they have had in the past or thought they would ever be able to apply for. This gave learners self confidence and inspiration to think more positively about potential jobs in the future.
- The general IT skills of learners on the ESP are low and therefore their ability to log onto the skills account website and then navigate their way around the site is very limited. As a consequence this reduces the likelihood that these learners will access their skills account outside of the course and without the assistance of a course tutor.
- Similarly, the overall use of language and vocabulary on the site is above the level of comprehension of many ESP learners. This also reduces the likelihood of these learners accessing the skills account website unaided. Consideration needs to be given to simplifying the login process and applying a Simple Measure of Gobbledygook (SMOG) test to the text included on the website to ensure it is appropriate for people with lower level literacy skills.
- Consideration should be given to including audio and video footage to support the text. This would assist learners with lower levels of literacy and IT skills to navigate around the



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- site. This may also encourage these learners to return to the skills account unassisted and outside of the course.
- Both tutors and individuals found the skills and interest tool and the job profiles inspired learners to consider a wider spectrum of jobs than they had experienced to date. If the skills account website could then link these profiles to actual jobs available in their area via Jobcentre Plus or a commercial website this would be of encouragement to these learners.
 - A critical success factor in integrating skills accounts into the ESP programme is having a provider with the necessary IT resources with dedicated ESP tutors with experience of using the skills account website. For this to be viable requires sufficient volumes of learners on each ESP course. Therefore, in contracting for ESP providers, consideration needs to be given to the resources of the organisation, viability in class size and the skills and experience of the tutor.
 - The positive attitude of the course tutor is critical to the success of integrating skills account into the ESP course. Having a 'can do' attitude and the ability to see how the skills account website content can add value to the ESP course and assist learners to achieve the employability award whilst on the programme is crucial.
 - Providers requested that they would be interested in reviewing any changes to the skills account website before it went live. This was to give providers the opportunity to review the new content and adapt their ESP curriculum to accommodate the changes. Providers would also like to begin to use the skills account website on other programmes where they feel the content of the site would be a valuable tool to help learners.



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Level 3 Trial

The Level 3 trial provides an upfront and flexible extension to current learner support schemes available for learners taking full Level 3 programmes. The overall aim of the trial is to test whether this extended offer encourages individuals to participate and remain in learning. The trial offer includes a discretionary fund (called the *Skills Account Learner Support Flexibility Element*) and an extension to the existing Adult Learner Grant (ALG), to provide support for second full Level 3 programmes.

In order to access additional funding individuals need to open a skills account. The trial is being delivered in the South East and East Midlands by **nextstep** and (initially) the 20 Strategic Learning Providers who offered skills accounts in 2008/09 (through the universal offer).

The trial commenced in March 2009 and formally ends at the end of March 2010. However, supported learners who are on programme at 31st March 2010 and whose learning goes beyond and up to 31 July 2010, will continue to be supported.

Research activity included interviews with **nextstep**, Strategic Learning Providers and key LSC staff. In addition two focus groups were conducted with learners who had received funding support through the Level 3 trial. The key findings listed below are based on this qualitative research evidence.

Key Findings

1. The flexible funding element was welcomed by both learners and providers and provided real and tangible benefits to a large number of individuals. In many cases the funding overcame financial barriers that would have prevented participation. However, about half of the participants in the focus groups told us that they would probably have participated anyway, even if the additional funding was not available.
2. Level 3 learners that we spoke to were very clear about their career aims and were clear about why they had chosen a particular course. They had a strong motivation to succeed and financial issues were often secondary to them.
3. Level 3 learners find out about courses and careers from a wide variety of sources, but in general are unlikely to use **nextstep**. The most widely used sources of information for these individuals appear to be the local college and the Internet.



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4. Uptake of Level 3 funding was greatest when it was channelled directly through colleges rather than being identified by the **nextstep** eligibility checker. However, this was largely because of the low usage of **nextstep** advisers and a number of operational factors (such as late availability of the eligibility checker, staff training etc.). It does not in itself provide evidence about the effectiveness of a demand-led approach, where individuals receive an upfront offer of support funding.
5. The eligibility checker tool appeared to be effective and easy to use but had comparatively low usage throughout the trial. Whilst online eligibility tools may have important future potential, the low volumes in this trial provide little additional evidence for their application and future development.
6. Strategic Learning Providers found that the Level 3 trial was an effective way of promoting skills accounts. The offer of “real money” added a valuable enhancement to the service, although in practice both learners and providers found that the link between the Level 3 funding and the skills account website was rather tenuous. A high proportion of learners did not continue to use their skills account after they had first opened it (possibly because learners at Level 3 already have clearly defined career and learning goals).
7. Many of the providers involved in the trial thought that various practical aspects of the trial were implemented late in the day, allowing insufficient time for appropriate planning, communication and training. As a consequence the scheme initially appeared over complex to some and it was difficult to provide an efficient process for September enrolments (this is to some extent a consequence of a “provider-led” system where internal planning timetables and processes often do not allow a rapid response to customer need).
8. Increasing numbers of individuals at Level 3 are accessing course information from the Internet. The LSC should consider whether skills accounts should be the first avenue for information about learner support eligibility (rather than **nextstep**), using appropriate eligibility tools themselves. The system could automatically provide direct links through to course search and job profile sections of the website, enhancing customer choice and motivation.
9. Feedback from learners suggested that skills accounts were promoted primarily as a mechanism to access Level 3 funding and the full benefits of skills accounts were therefore not always apparent to learners.



Recommendations

1. The LSC should consider including audio and video clips on the skills account website. This would provide a number of practical benefits, including:
 - Improved accessibility for individuals who have low literacy skills. Video clips could help these individuals navigate more effectively around the site.
 - The provision of examples and case studies, illustrating the practical benefits of skills accounts for different target audiences. A video clip of a Level 3 learner, for example, might illustrate how a skills account could be used to find information on Foundation Degrees. A video clip of an employed adult might illustrate how the learner record could be used to store details of continuing professional development. The research evidence has suggested that individuals will only return to the skills account website if they can understand how it will benefit them personally and the provision of video clips on the home page will help to achieve this.
 - Greater usability and interactivity. Many individuals now have an expectation that websites will contain audio and video links.
2. The LSC should consider applying a SMOG (Simple Measure of Gobbledygook) test to the text included on the website to ensure it is appropriate for people with lower level literacy skills.
3. Providers should consider embedding the use of skills accounts into mainstream activity such as tutorials and teaching sessions. Research evidence suggests that practical hands-on support with skills accounts can have a significant impact on how frequently it is used. The IES trial has shown how skills accounts can be successfully embedded into the ESP programme, but this could be extended to teaching and support at all levels.
4. The LSC should consider whether skills accounts should be the first avenue for information about learner support eligibility for Level 3 learners, accessing appropriate eligibility tools themselves directly from the website. The system could automatically provide direct links through to course search and job profile sections of the website, enhancing customer choice and motivation and helping to create a “demand-led” approach. If individuals require further information or advice they could then be re-directed to a telephone helpline or could book a face to face interview with an adviser.
5. The LSC should consider including more information on the skills account website for older employed adults. This might include information about re-training, continuing professional development and discrete staff development units that could contribute towards a qualification.



1. Introduction

1.1 This report builds on the earlier telephone surveys of skills account holders (*Skills Account Holder Telephone Survey*³) and provides an initial evaluation of specific aspects of the skills accounts trials. In particular the report focuses on the universal offer, the Level 3 trial carried out in the South East and East Midlands and the Integrated Employment and Skills (IES) trial implemented in the West Midlands. Appendix 2 includes case studies showing how the skills accounts trials have operated in a Strategic Learning Provider, a **nextstep** prime contractor and an ESP provider.

1.2 The evaluation was undertaken by the LSC, which ceased to exist on 31 March 2010. In future the work undertaken by the LSC will fall under the remit of its successor body, the Skills Funding Agency.

1.3 A skills account is a personalised online service which provides an individual with:

- Direct online access to skills and careers information, advice and guidance;
- Details about their eligibility for government funding for training;
- Information on courses in their area.

1.4 A skills account is a new way for an individual to take control of their learning and working life through a variety of online tools available. In addition, skills and careers advice are available over the telephone or through face to face sessions.

1.5 Skills accounts are being trialled on a regional basis, which will expand throughout 2009/10. They are available on a trial basis in England during 2010 with a national roll-out from August 2010. As the skills accounts trial develops more services and functions will be available through the skills accounts website.

1.6 A skills account brings together all the information, support and services an individual would need in order to make informed choices about their learning and working life. Through a skills account, individuals are able to access the following tools:

- **Course Finder Tool** for viewing what courses are available in their area so that they can choose the provider, course and time that suits their needs;

³ Evaluation of the Skills Account Trials - Skills Account Holder Telephone Survey (LSC 2009) LSC-P-NAT-090179. The survey was based on 900 interviews carried out in June and September 2009.



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- **Skills and Interest Assessment Tool** that helps individuals to identify the skills they need to manage their career;
- **Qualifications Calculator Tool** that shows an individual's current level of learning to help them plan their next steps;
- **Careers Advice Job Profiles** allows individuals to search across a range of information about the types of job they are interested in;
- **Personal Learning Record** which allows individuals to add previous learning achievements and any courses they are currently undertaking;
- **Approved Learning Record**, verified by a learning provider, which contains details of an individual's past achievements and qualifications to date;
- **Funding Indicator Tool** that allows individuals to identify the level of funding the Government may have contributed towards the total cost of their learning. This will be set against their own contributions (where appropriate);
- **Learner statement** which shows the actual funding the Government has put towards their learning;
- **Skills Action Plan** which is a personal development plan that is created following completion of a Skills Health Check with a **nextstep** adviser (if applicable). The Skills Action Plan can also be created directly by a user online, via the Skills Diagnostic Tool.

1.7 Information on skills accounts can be obtained from a **nextstep** adviser, the careers Advice Service helpline or Strategic Learning Providers⁴ in the trial regions. Alternatively individuals can access a skills account directly online via the web address:

<https://skillsaccounts.direct.gov.uk/Pages/default.aspx>

1.8 The skills accounts trials began in the South East and East Midlands LSC regions in September 2008 and in the West Midlands in January 2009. The aim of the first year of the trials was to ensure that what was being offered through a skills account meets an individual's needs and expectations. The second year of the trials (2009/10) further enhances both the functionality of the website and expands into the other 6 LSC regions.

1.9 The **universal offer** is aimed at all adults in a trial region. In 2008/09 the universal offer was available in the South East and East Midlands regions, through 20 Strategic

⁴ Strategic Learning Providers are providers that have specific responsibility for promoting and offering skills accounts, capturing customer details, responding to learner enquiries and providing the LSC with monthly data returns.



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Learning Providers, the **nextstep** service and the Careers Advice Service helpline. During 2009/10 the universal trial is being rolled-out across all 9 regions.

1.10 The **Integrated Employment and Skills (IES) Trial** focuses on supporting people who are unemployed to progress into sustainable employment with training. The 2008/09 IES trials in the West Midlands piloted the use of skills accounts as part of the new service. In particular skills accounts were used by learning providers who were offering the 15 week Employability Skills Programme (ESP). The ESP is an ESF (European Social Fund) co-funded programme aimed at adults aged 18+ and provides employability training for 20 hours per week for up to 15 weeks. The provision has been designed to offer unemployed adults the opportunity to achieve an employability qualification that develops all areas of returning to employment.

1.11 The **Level 3 Trial** is specifically aimed at individuals studying for a full Level 3 qualification. The Level 3 trial provides additional learner support funding for eligible individuals, linked to the opening of a skills account. The trial offer includes a discretionary fund (called the *Skills Account Learner Support Flexibility Element* and an extension to the existing Adult Learner Grant (ALG), to provide support for second full Level 3 programmes.

1.12 This report provides an insight into the use of skills accounts within these different contexts, comparing the use of skills accounts for all adults, those who may have low level skills and are unemployed and those who are taking or planning to take a course at Level 3.

1.13 The research was conducted between June 2009 and January 2010 and includes findings from a large telephone survey of skills account holders, focus groups with learners, interviews with providers and other stakeholders and analysis of the skills account database. Details of the research methodology are provided in the Technical Annex (Appendix 1).

1.14 The skills account website was updated in November 2009, introducing a 'learner wheel' symbol designed to help individuals find information more easily (see Figure 1). The majority of the research activity was conducted with learners who had experienced the earlier website and any findings within the report are based on this website unless otherwise stated.

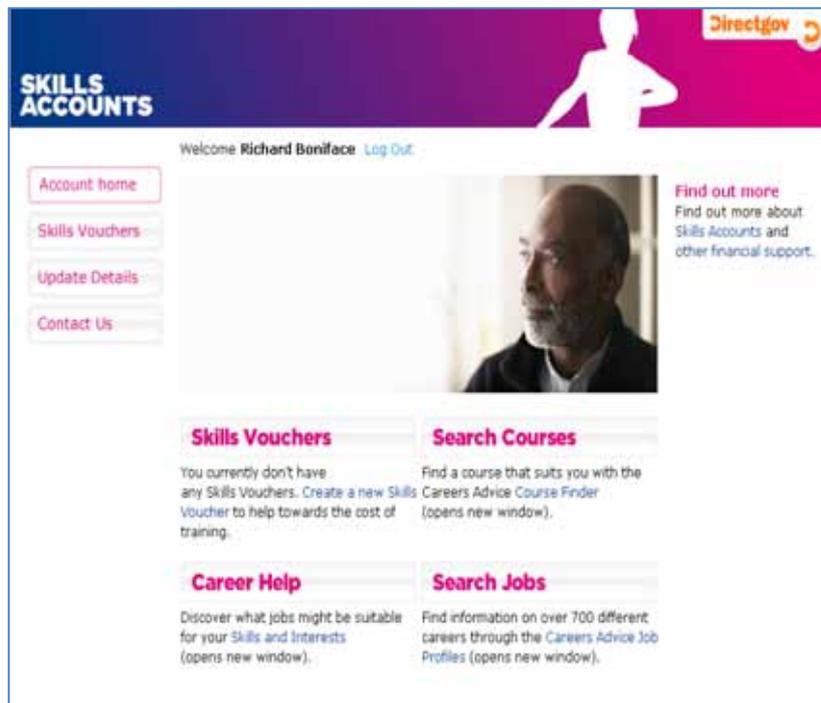


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Figure 1: The Skills Account Website

Prior to November 2009:



Since November 2009:



2. The Universal Offer

Introduction

2.1 The universal skills account offer is targeted at all adults within a trial region. In 2008/09 the universal offer was available in the South East and East Midlands regions, through 20 Strategic Learning Providers, the **nextstep** service and the Careers Advice Service helpline. During 2009/10 the universal offer is being rolled-out across all 9 regions.

2.2 This report provides additional insight into some of the key findings that have emerged from previous research studies. In particular, the *Skills Account Holder Telephone Survey*⁵ report, based on interviews with skills account holders in June and September 2009, highlighted a number of findings relating to the universal offer. These were:

- More than 93% of respondents thought that skills accounts were a good idea.
- Most respondents thought that skills accounts will encourage them to take part in future learning. In both surveys almost 80% of respondents agreed with this statement.
- The majority of respondents thought that skills accounts were easy to activate and use. Less than 6% of respondents in each survey said that skills accounts were *quite difficult* or *very difficult to use*.
- A high proportion of respondents do not return to the skills account website after their first visit.
- The most significant factor affecting satisfaction with the skills account service appeared to be the age of the respondent.
- Ease of use was a key factor determining satisfaction with the service and whilst the majority of respondents did not think the website was difficult to use, there is still scope for improvement, as less than half of respondents said that it was *very easy to use*.
- Many respondents were unsure about the advantages of skills accounts and their practical benefits.
- Tools related to funding entitlement were in general felt to be useful but there was some confusion about their use and concern about whether Skills Vouchers would be accepted by providers.
- The surveys suggest that where skills accounts are opened with dedicated face to face support the percentage of users who are dissatisfied with the service decreases.

⁵ Evaluation of the Skills Account Trials - Skills Account Holder Telephone Survey (LSC 2009) LSC-P-NAT-090179. The survey was based on 900 interviews carried out in June and September 2009.



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2.3 The findings in this latest report are primarily based on a further telephone survey with 1200 new skills account holders, which took place in December 2009 and January 2010. In addition to the main survey, follow-up telephone interviews took place with 400 individuals who were first contacted in either June or September and also a group of 350 individuals in learning who did not have skills accounts (acting as a control group). The complete set of results from this and other surveys taking place in 2010 will be published later in the year. Details of the telephone survey sample size and the profile of respondents are given in the Technical Annex (Appendix 1).

2.4 The skills account website underwent a major update during November 2009. The vast majority of the telephone survey respondents first accessed the website prior to this date and so quantitative findings predominately relate to the previous version of the website. The telephone survey data is therefore supplemented with evidence from three focus groups of learners that took place between November 2009 and February 2010. These focus groups provide initial feedback on the usability and benefits of the updated website.

2.5 The report looks at four important questions:

- Have perceptions about skills accounts changed significantly since the previous telephone survey?
- Given that a high proportion of skills accounts users do not appear to return to the website after their first visit, what factors affect frequency of use and how can we encourage individuals to use a skills account more often?
- Given that one of the most significant factors affecting satisfaction with the skills account service appeared to be the age of the user, can we gain more insight into the reasons for this, in order to help us address the issue in the future?
- Do skills account holders find the latest software release easier to use and does it provide greater practical benefits for them personally?

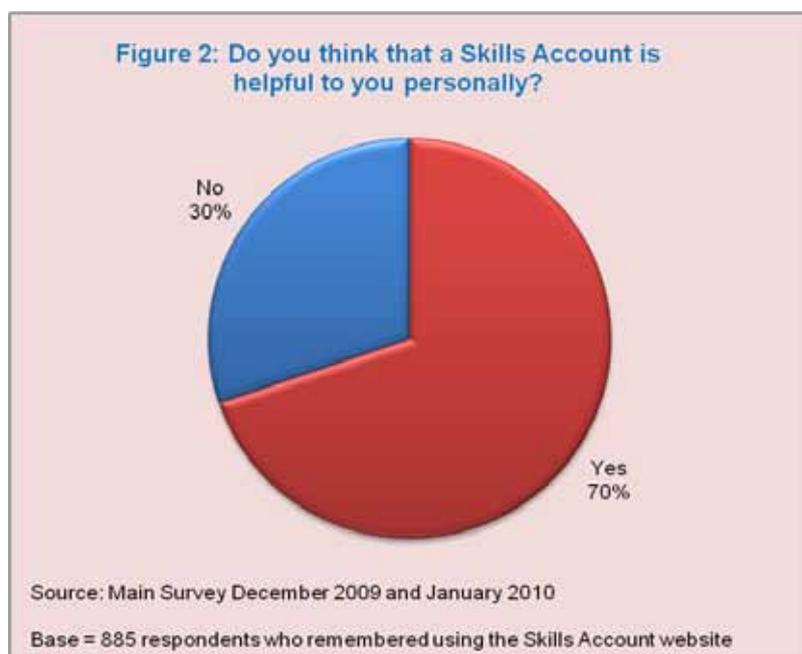


Summary of Findings from the Latest Telephone Survey

2.6 The findings from the latest telephone survey, in general, reinforced findings in previous surveys. In particular:

- The percentage of individuals who thought that skills accounts were a good idea remains very high at 94% (up from 93% in the previous survey).
- Overall satisfaction with the skills account service is similar to the previous survey and remains high (66% of respondents were *very satisfied* or *fairly satisfied* in both surveys).
- The percentage of individuals who thought that skills accounts were *very easy to use* or *easy to use* has remained unchanged at around 89%.

2.7 The latest survey also asked respondents whether skills accounts were *helpful for them personally* (as opposed to the general concept of skills accounts being a good idea). The chart below shows that 70% thought that skills accounts were helpful for them personally.



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2.8 Individuals who were re-interviewed for the follow-up survey were less positive about the skills account service than at the time of their initial interview. However, this seems to be due to a rise in the *neutral* and *don't know* responses, rather than an increase in the percentage who were dissatisfied.

2.9 This is probably related to the fact that many of the individuals have not continued to use the website. In the follow-up survey those who regard themselves as frequent or occasional users has dropped from 60% to 30%. Factors affecting frequent usage of the website are discussed in more detail later in this section.

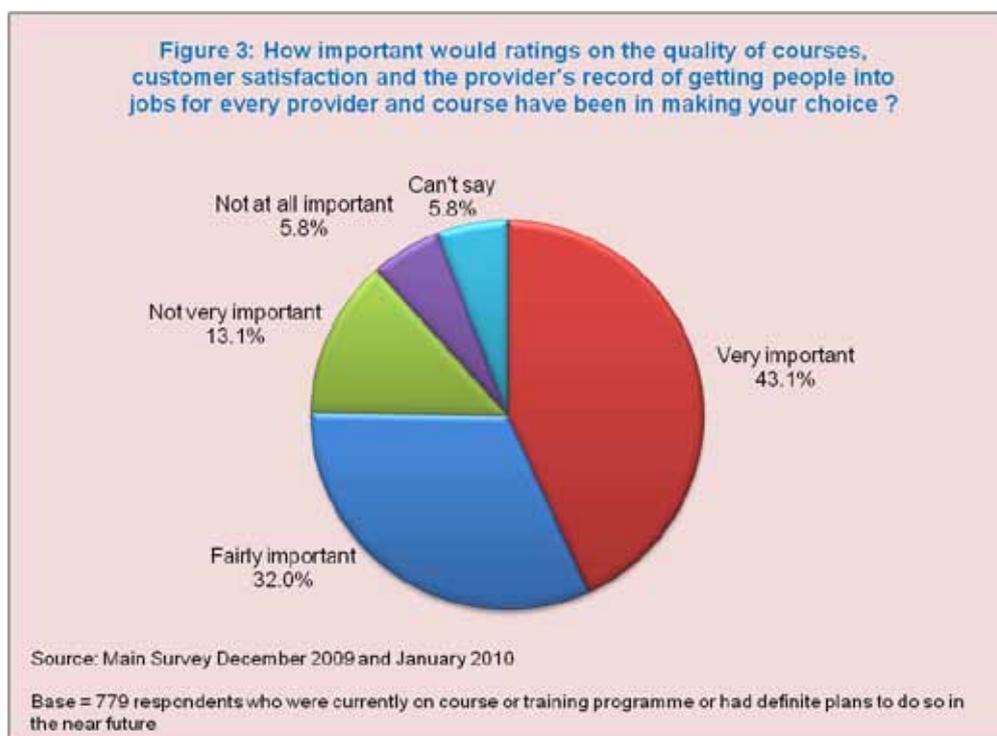
2.10 Individuals who are new to skills accounts are slightly more likely to think that they are a good idea (94%) compared to those that have had a skills accounts for a longer period of time (89%). This again is probably due to a lack of use of the website by individuals who have had a skills account for a long period of time.

2.11 The percentage of respondents who felt that they had a *choice of different learning providers* was higher amongst skills account holders (53%) than amongst non-skills account holders (43%). This is a potentially very interesting finding that will be investigated further in future research.

2.12 The response to the question *How satisfied are you with your course or training?* was remarkably consistent between the survey of new skills accounts holders, the follow up-survey of existing skills accounts holders and the control survey of individuals who did not have a skills account. The overall course or training satisfaction rating (satisfied or very satisfied) was well over 90% for all three surveys.

2.13 Future versions of skills accounts that include *traffic light ratings* for providers and courses could drive up satisfaction scores still further, helping individuals choose courses or providers that had the best possible quality of provision. Figure 3 shows that three quarters of survey respondents thought that including this type of information was very important or fairly important. This issue will be explored further in future reports, but early analysis suggests that responses to this question varies with age, with individuals over the age of 45 having stronger views than younger people (more likely to think that a ratings system was either *very important* or *not at all important*).





2.14 Individuals who have had a skills account for a long period of time (follow-up survey) are more likely to have told someone else about them than individuals who are new to the skills account (42% compared to 34%). Whilst this percentage is bound to increase with time (the longer a person has had a skills account the more opportunity they have had to tell someone else about them) the increase appears to be significant. This suggests that, over a period of time, the uptake of skills accounts is likely to spread fairly rapidly through word of mouth and personal recommendation.

Factors Influencing Frequency of Use of the Skills Account Website

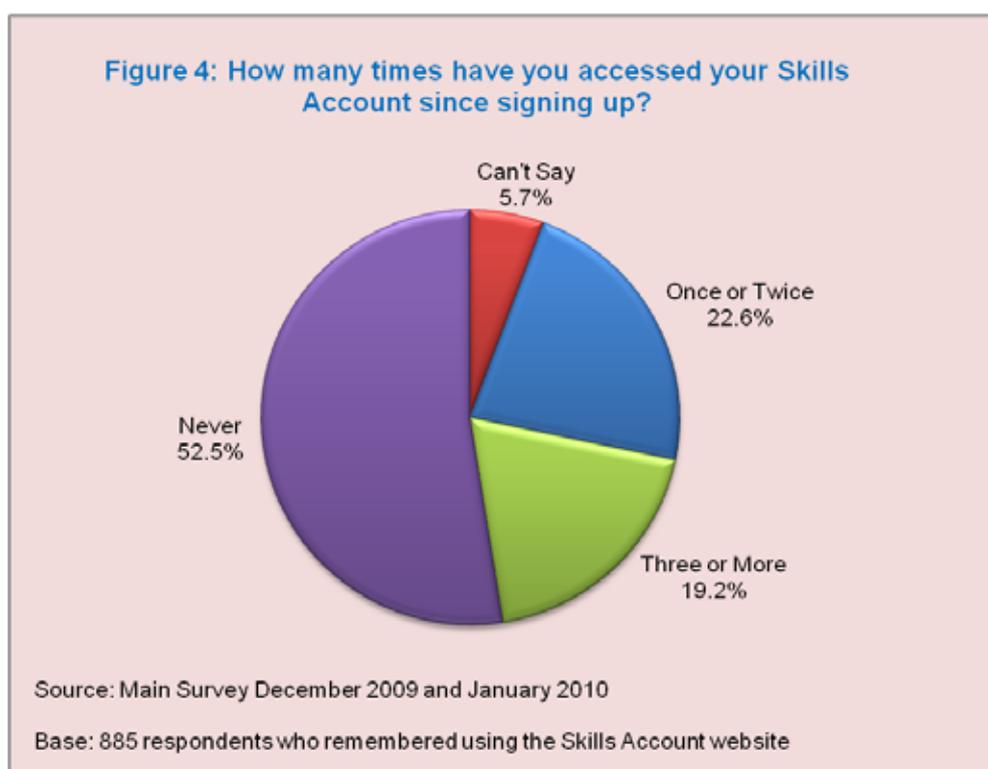
2.15 Overall, the usage of the skills account website appeared to be fairly low. Of the 1,200 respondents in the main survey, around 30% could not remember using the skills account website at all (even though a formal login and activation process had been recorded on the skills account database). It is likely that many of these individuals had their skills account opened for them by an intermediary such as a **nextstep** adviser. Unfortunately this information is not recorded directly on the skills account database.



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2.16 Of the 855 individuals who could recall using the skills account website, over half did not return to the skills account website after their first visit. However, around 20% were *frequent users*, accessing their account three or more times (and in some cases more than 10 times). The possible reasons for never returning to the website after the first visit and the characteristics of frequent users are discussed in more detail below. Understanding these groups will help to support strategies for a successful national roll-out of skills accounts over the next few years.



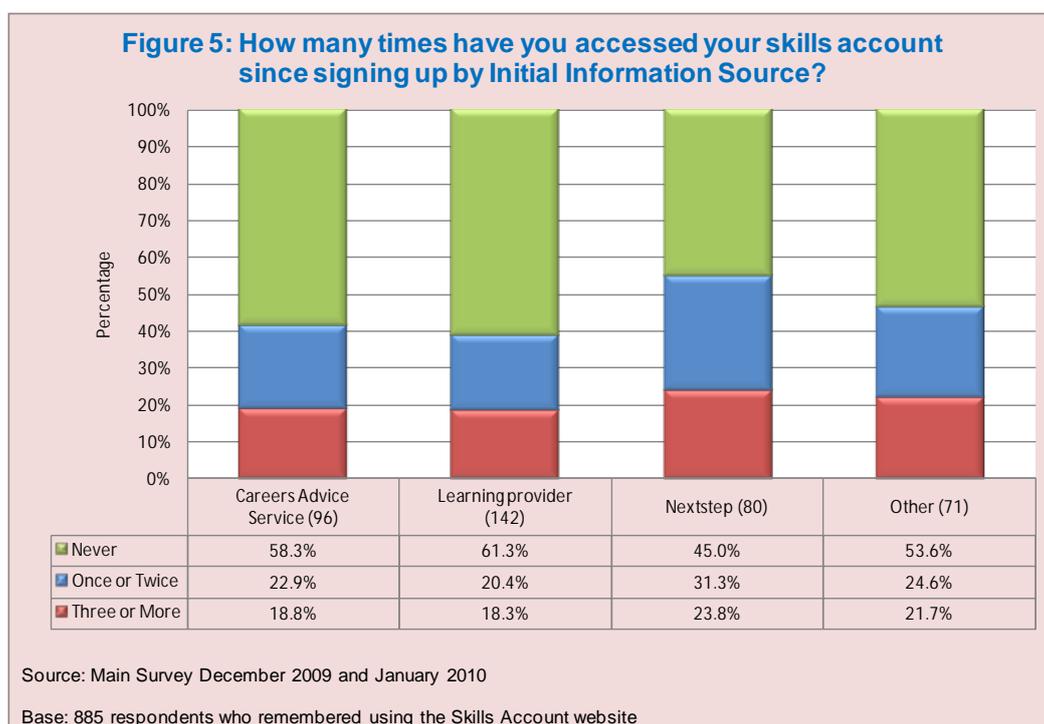
2.17 The likelihood of returning to the website after the first visit did not appear to be affected by the age of the skills account holder, whether the individual was taking or planning to take a course, perceived ease of use of the website or whether they had help activating their account. Females however were more likely to never return to the website than males (56% of females compared to 49% of males).



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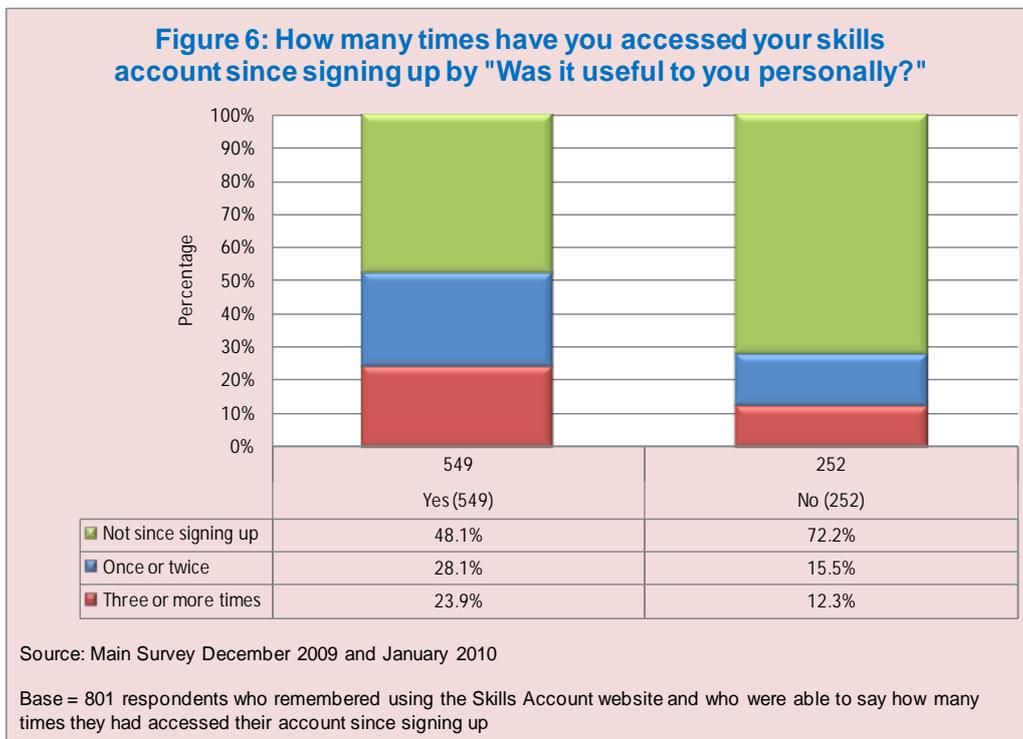
2.18 Individuals who heard about skills accounts from **nextstep** or independently on the website were more likely to return than individuals who heard about it from learning providers or the careers advice service. This is illustrated in the chart below (55% of individuals who first heard about skills accounts via **nextstep**, for example, returned to the website compared to 38% who first heard about skills accounts from learning providers). The category *other* includes word of mouth, internet search, website, and work/employment.



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2.19 The most significant factor determining whether an individual returns to the website after their first visit appears to be whether the skills account was seen as being *useful to them personally* (see chart below). Focus group discussions suggested that initial impressions of usefulness at the first visit were extremely important, particularly derived from information on the home page. Before individuals have had chance to explore all of the tools in detail they clearly need to identify real and tangible benefits both now and in the future. If these benefits are not clear then individuals will not be sufficiently interested and motivated to come back and explore further.



2.20 A significant proportion of individuals, however, were sufficiently interested or motivated to return to the skills account website again after the first visit and around 19% accessed the website a further three or more times. All of these individuals will have had sufficient time to appreciate the functionality of the site and to explore the resources and tools that are available.

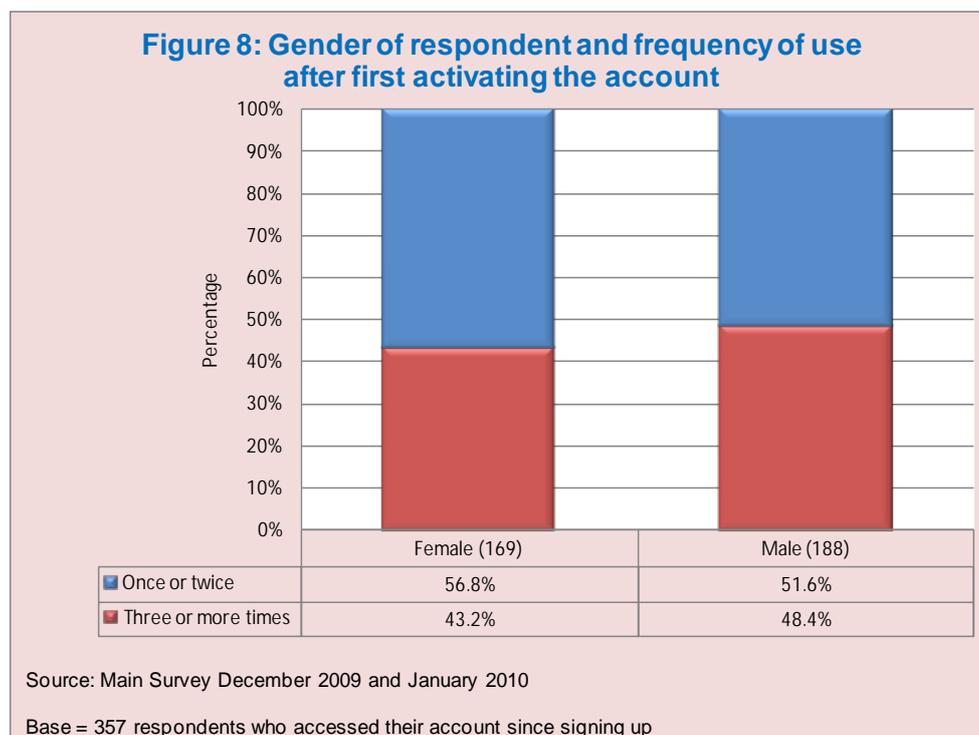
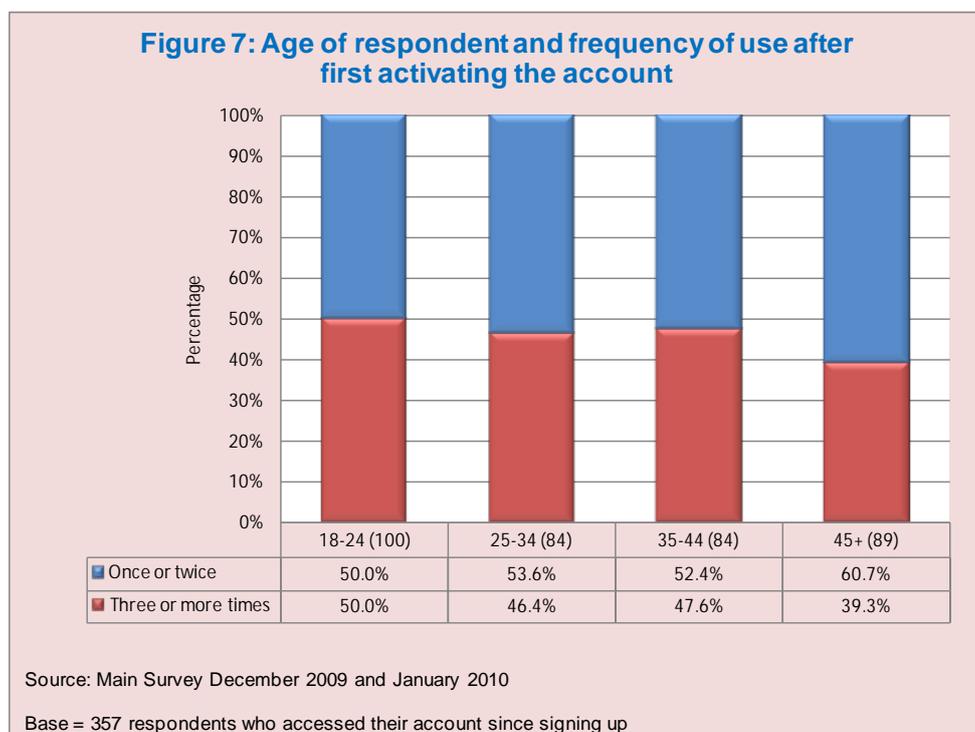
2.21 Personal characteristics, such as the age and gender of the user, appear to have an impact on whether an individual is a *frequent user*. Individuals under the age of 35 and males are likely to access the skills account website more frequently than older people and females (note: the sample size for 55+ learners is small so the results for this age group should be treated with caution). This may be related to experience with information technology and



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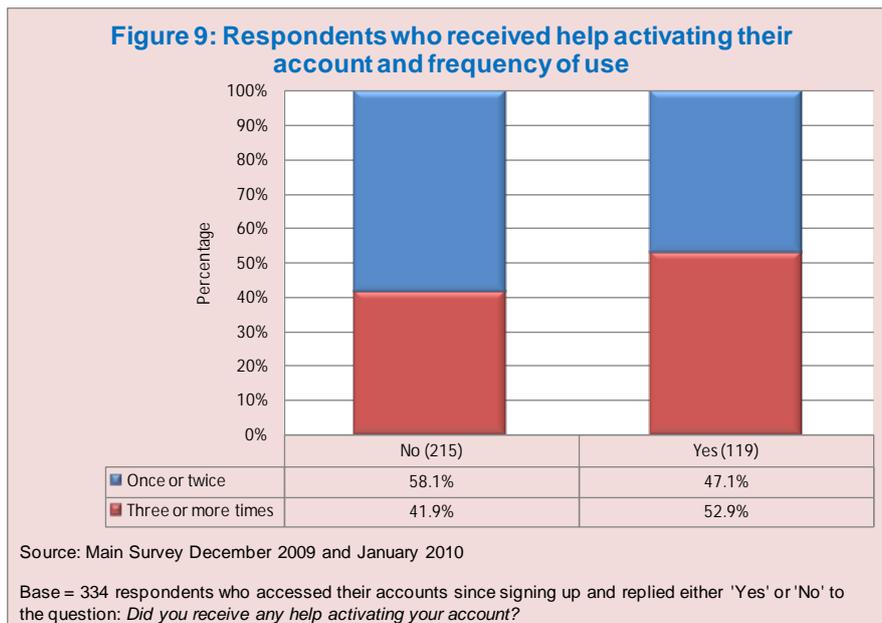
access to computers. However the differences in usage within these categories are quite small.



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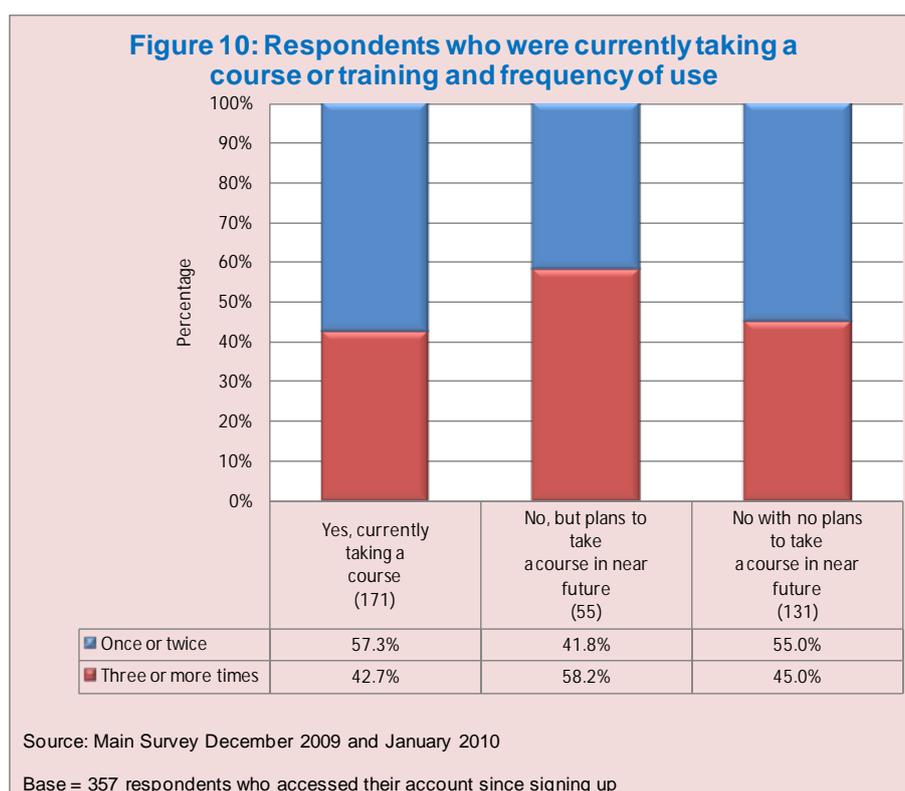
2.22 Individuals who received help in activating their skills account were more likely to become *frequent users* than those that didn't. An initial face to face induction may well provide the opportunity for new users to ask questions and to understand the details of the individual skills account tools and this may be particularly helpful for individuals who are less confident with IT. A couple of learning providers have appointed dedicated members of staff (as part of the Level 3 trial) to help individuals open a skills account and to demonstrate the key tools and this seems to have made a significant difference to the uptake and use of skills accounts. An alternative approach is to actively use skills accounts during a tutorial or teaching session (as happens within many of the Employability Skills Programmes). Initial personal support with skills accounts is an additional activity for providers but this one-off support would help to ensure that individuals continue to use the online service in the future and in the long run may prove to be worthwhile.



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2.23 The most significant factor determining whether an individual is a *frequent user* rather than an *occasional user* is whether they are *planning to take a course in the near future*. Figure 10 shows that almost 60% of skills account holders who were not currently in learning, but were planning to take a course, were frequent visitors to the site. In contrast only just over 40% of individuals currently in learning were frequent users. This finding is confirmed by multivariate CHAID (Chi-squared Automatic Interaction Detector) analysis⁶ which investigated the relationship between frequency of use and a number of possible independent variables. The multivariate analysis suggests that planning to take a course is much more strongly correlated with frequency of use than factors such as *how you first heard about skills accounts* or *overall satisfaction* with the skills account service.



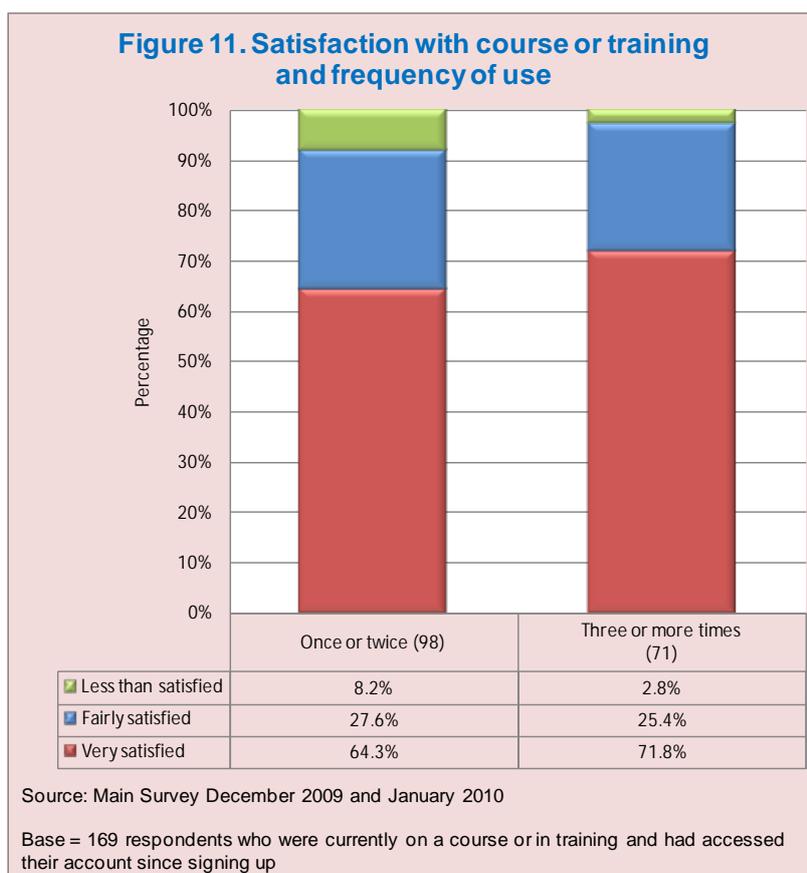
⁶ This program searches large bodies of data to identify combinations of variables that cause maximum variation in a given outcome (i.e. response to the dependent variable).



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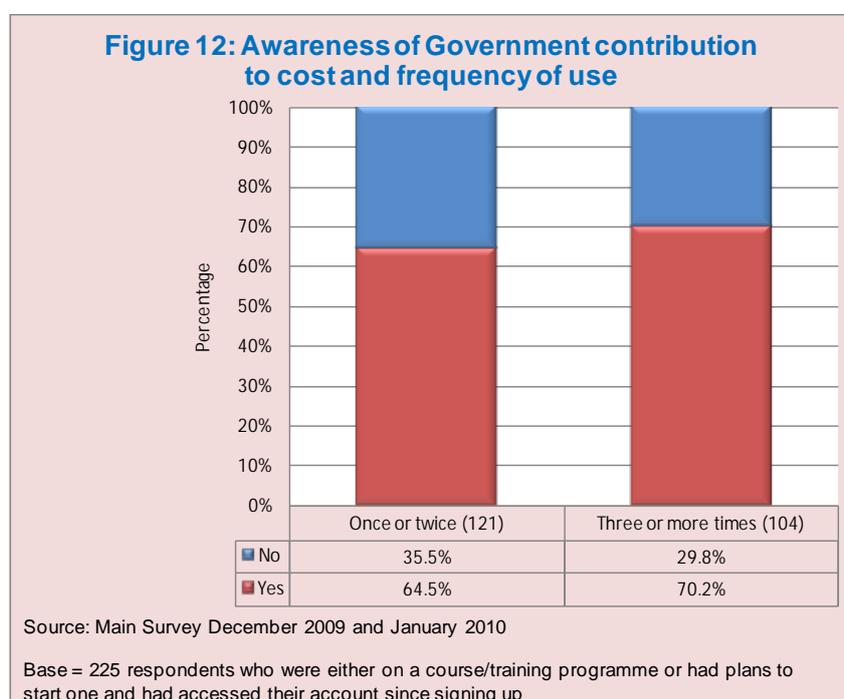
2.24 It is interesting to note that learners who were frequent visitors to the skills account website were more likely to be satisfied with their current course or training programme than learners who had only visited the website once or twice (Figure 11). Whilst we should treat this result with a degree of caution at this stage, over a period of time the relationship between skills account activity and learner outcomes (such as success rates, learner satisfaction, destination etc.) will be important parameters to measure.



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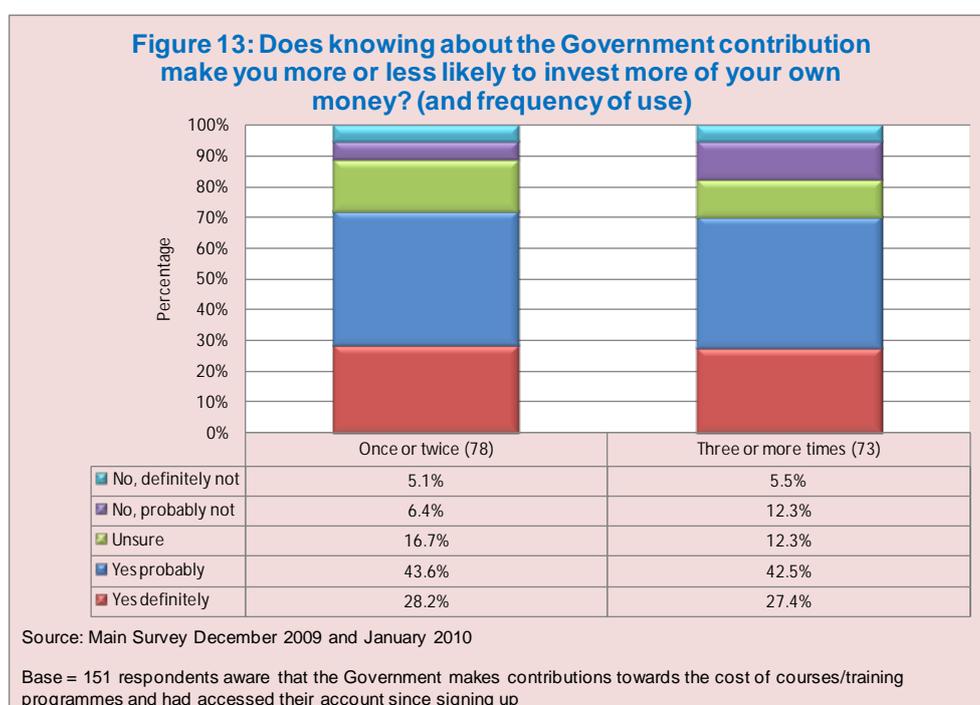
2.25 Frequent users of skills accounts were more likely to be aware of the Government contribution to the cost of learning than occasional users (Figure 12). Information on the website may have a key role to play in the future in changing people's attitudes towards the cost of learning (and course fees) and this will be investigated further in a future evaluation report.



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2.26 Frequent users, who were aware of the Government contribution to the cost of learning, were, however, less willing to invest their own money in learning than occasional users. This may be because more frequent users are young adults, with less spare cash. Alternatively, frequent users may be in the process of changing careers and this may have an impact on their financial position. The numbers involved in the analysis and the relative differences are small, so further research will be required in the future.

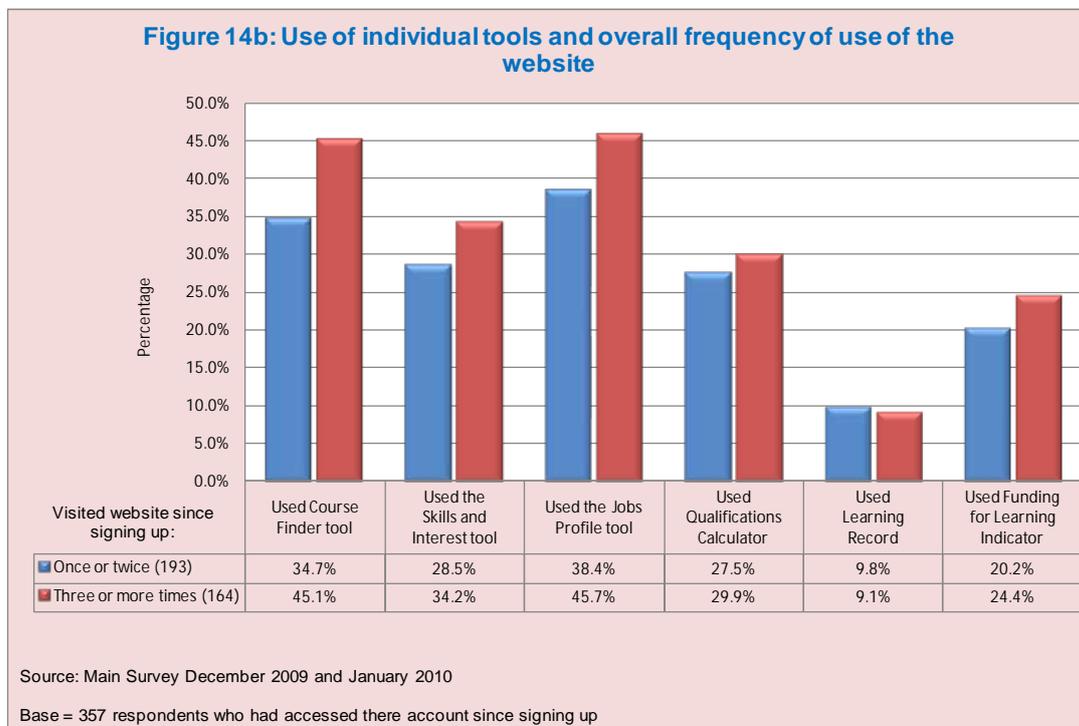
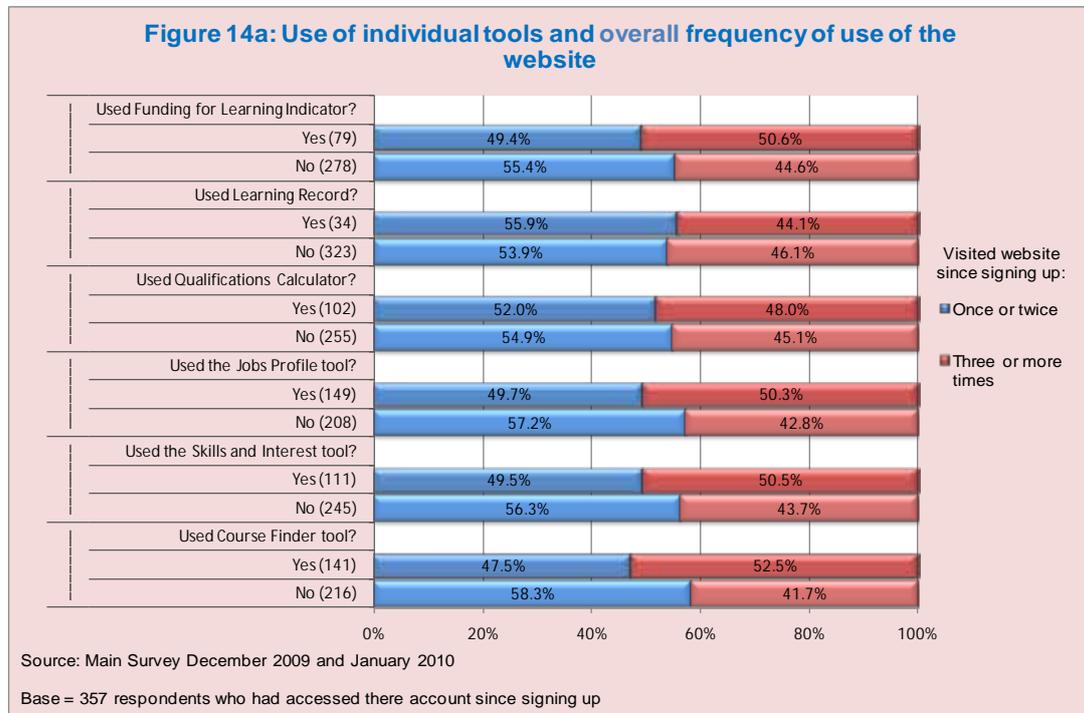


2.27 The most widely used website features were the Course Finder tool and the Jobs Profile tool, followed by the Skills and Interests Assessment. However, the relative usage of individual tools did not appear to vary significantly between occasional users and frequent users (Figure 14a). This suggests that the reason why some individuals are frequent users is not related to the particular benefits of any one tool.



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2.28 In summary the research findings suggest that when individuals visit the skills account website for the first time they need to gain a clear appreciation of how a skills account is going to benefit them personally. If this is not apparent they are much less likely to return.

2.29 However, even when the benefits are clear, frequent use of the site is much more likely to occur at particular times – typically when an individual is actively looking for a new course. The likelihood of frequent use is also increased if the individual had help activating their account in the first place. The skills account team may wish to review whether a skills account is intended to be used only at specific times in a person's life or whether it would be desirable if it had more general usage on an on-going basis. If the latter is the case, clear benefits for the user at all stages needs to be articulated.

Age of the Individual and Skills Accounts

2.30 The *Skills Account Holder Telephone Survey*⁷ report, published in December 2009, found that the most significant factor affecting satisfaction with the skills account service was the age of the respondent. The report recommended that the development team should take into account the likelihood that younger people may be more familiar with the use of online tools and have greater access to IT services.

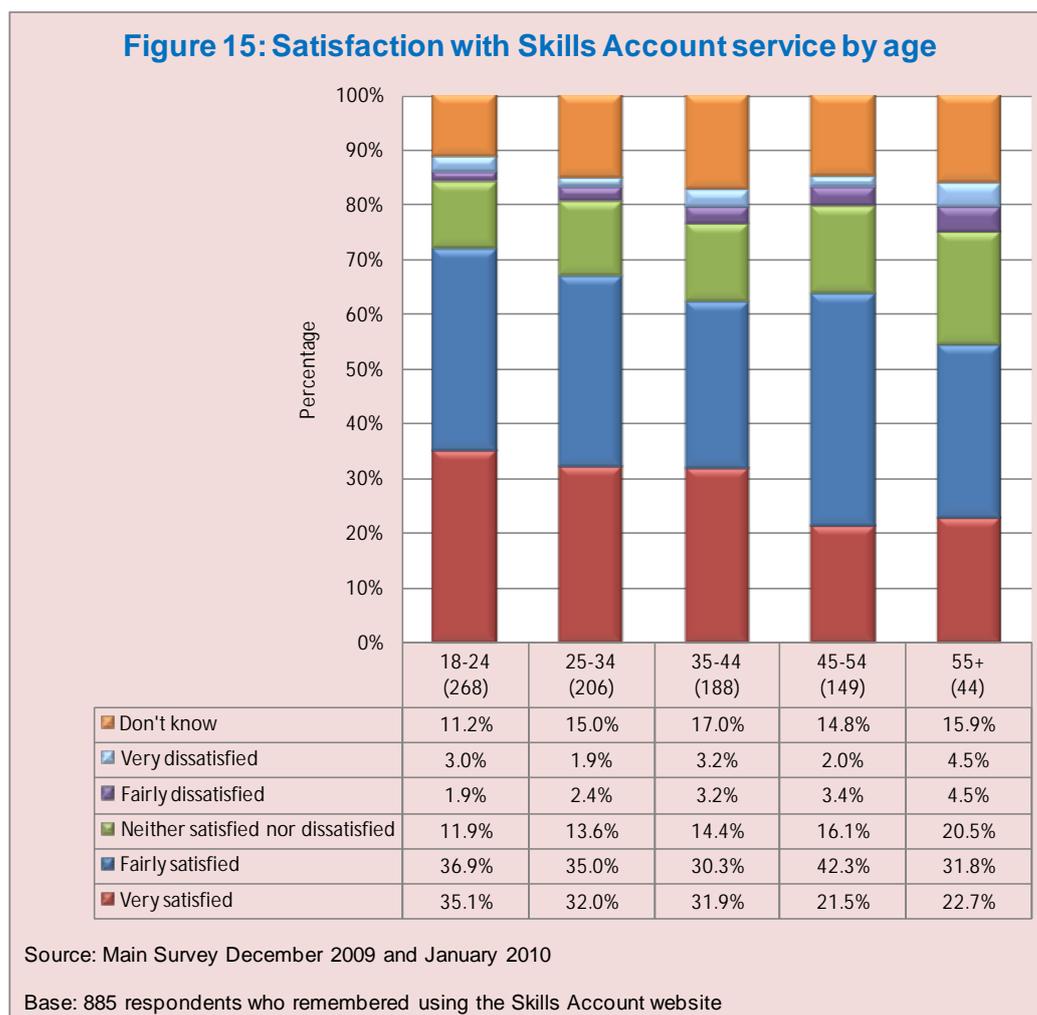
2.31 The latest telephone survey confirms these findings. The chart below shows skills account satisfaction by age of respondent. Whilst over 70% of 18-24 year olds were *very satisfied* or *fairly satisfied* with the skills account service, this drops to just over 60% for individuals aged over 35 (and 54% for the 55+ age group, although this is a very small sample group).

⁷ Evaluation of the Skills Account Trials - Skills Account Holder Telephone Survey (LSC 2009) LSC-P-NAT-090179. The survey was based on 900 interviews carried out in June and September 2009.



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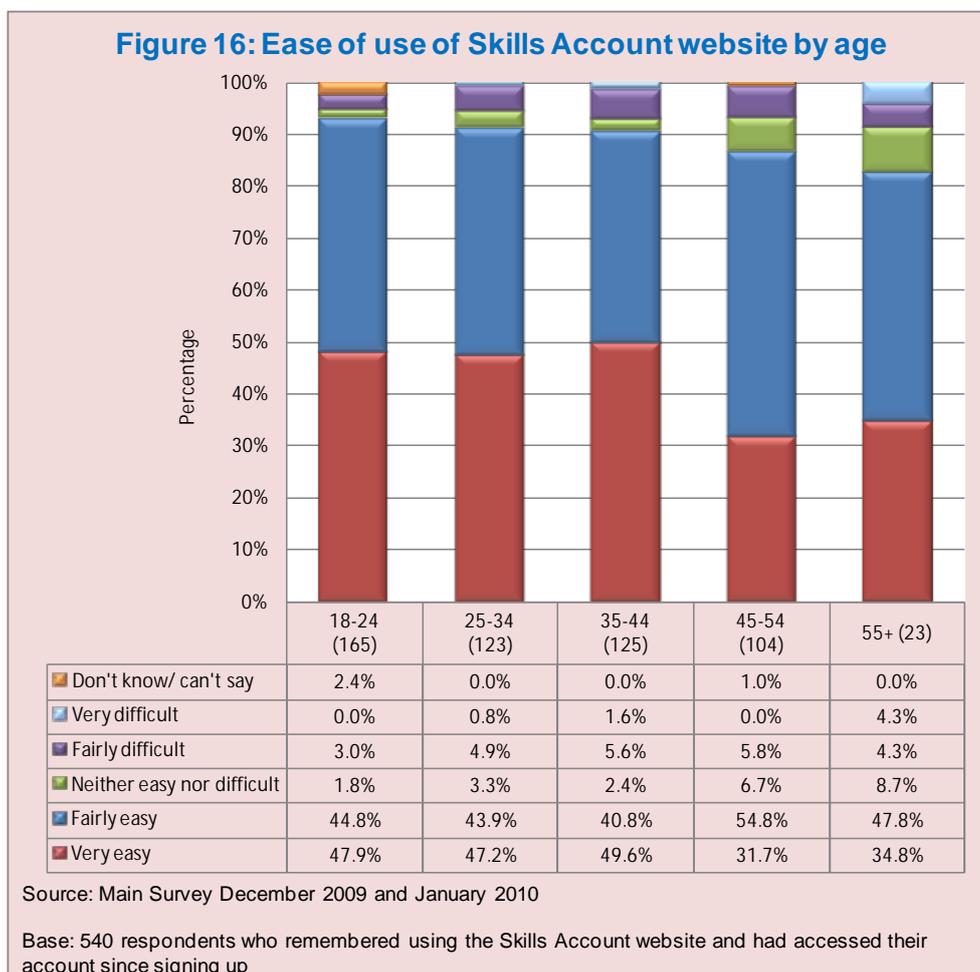


2.32 Further evidence from the latest telephone survey confirms that confidence with information technology is probably an important reason behind this variation. A lower proportion of over 45 year olds find the website *very easy* to use, compared to adults aged under 45 (see chart on the next page). However, individuals aged between 35 and 45 appeared to have similar views about the website's ease of use as younger adults.



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2.33 Older adults were also less likely than 18-24 year olds to be taking a course or planning to take a course in the near future (see Figure 17). As a result older adults may perceive that they have less need for a skills account (may well have a settled career) and this may explain why the overall skills account satisfaction rating of older adults is lower.

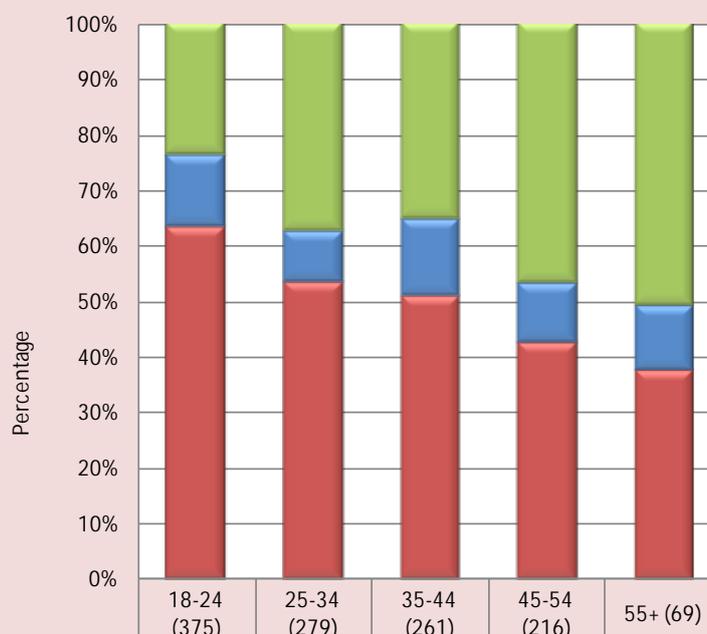


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2.34 Many older adults will have a settled career and may appear to have little need for a skills account. However, many adults will need to change careers several times during their working life and will probably be engaged in continual professional development and technical updating within the workplace. Recording and providing additional information on these types of features could be particularly valuable for older adults. This functionality may need to be developed further within the skills account website, in order to ensure that skills accounts are seen as valuable and have lasting benefits for all age groups.

Figure 17: Taking a course or planning to take a course by age group



	18-24 (375)	25-34 (279)	35-44 (261)	45-54 (216)	55+ (69)
■ No - and have no definite plans to take a course in the near future	23.7%	37.3%	35.2%	46.8%	50.7%
■ No - but have definite plans to take a course in the near future	13.1%	9.3%	13.8%	10.6%	11.6%
■ Yes - taking a course	63.2%	53.4%	51.0%	42.6%	37.7%

Source: Main Survey December 2009 and January 2010

Base = 1200 (All respondents to questionnaire)



Customer Feedback on the Latest Version of the Skills Account Website

2.35 The early versions of the skills account website provided direct access, from the homepage, to a range of tools such as the *course finder*, *jobs profile* and the *skills and interests assessment*. Whilst many customers found these tools useful there was some confusion about which tools should be used first and in which contexts.

2.36 In order to address this issue the skills account website underwent a major update during November 2009. The new software release introduced a more visual approach, showing a typical customer journey in the form of a wheel. The wheel has six different coloured segments, highlighting the stages in this journey, labelled as *My Skill Needs*, *Find a Course*, *Funding for Learning*, *How to Enrol*, *My Achievements* and *Investment in Me*. Clicking on a segment takes you through to more information and provides access to the key skills account tools.

Figure 18: Skills Account Website (from November 2009)



2.37 The updated skills accounts website also now provides:

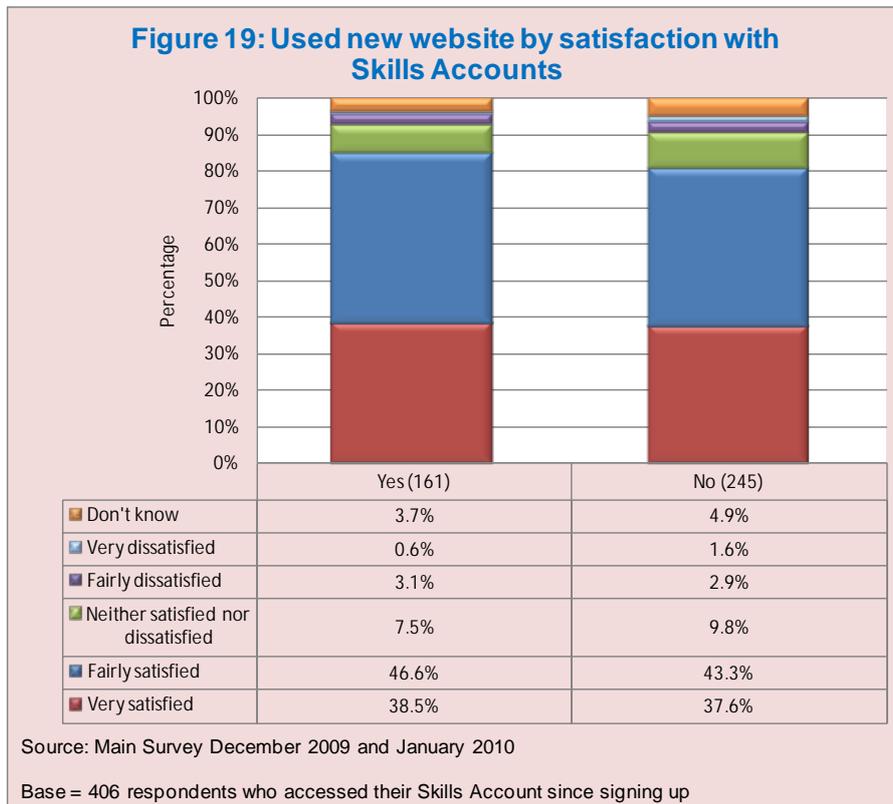
- Access to a variety of pages and tools prior to logging in or registering for a skills account;
- A Skills Diagnostic tool - a web-based tool that provides an objective assessment of the customer's strengths, skills, abilities and areas for development in key competency areas which underpin success at work;
- Funding Entitlement tools – Government funding eligibility checkers to enable individuals to understand and access government contributions towards learning.

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2.38 Many of the telephone survey respondents first registered for a skills account prior to the release of the new website, so it is difficult at this stage to determine the full impact of the changes. However, early indications suggest that the website has been positively received.

2.39 The following chart, for example, shows that there appears to be very little difference in satisfaction with the skills account service between users of the new website and users of the previous version.



2.40 More detailed feedback on the new website came from focus groups with skills account holders. These were held between December 2009 and February 2010 at three different Strategic Learning Providers in the South East and East Midlands. The majority of participants in the focus groups were studying at Level 3, reflecting the link between the promotion of skills accounts and the Level 3 trial in these regions (the focus groups also provided specific feedback on the Level 3 trial). The focus groups included a live demonstration of the skills account website by the facilitator, which prompted a discussion with the participants.



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2.41 Participants were in general very positive about the look and feel of the new website and thought that the wheel was a very helpful image. One participant, for example, said:

'That circle works well because it's very visual. It stands out, it makes sense and it links it all together. The circle was also on the letter I received and I immediately recognised it'

2.42 Other participants told us that the design of the homepage encouraged them to want to explore the site further. Typical comments included:

'I think the homepage is interesting and helps to pull you in'

'It makes you want to click on the circle. It's a bit like Trivial Pursuit with the colours'

2.43 Focus group participants also felt that the website was relatively easy to use. Comments included:

'It's well laid out and easy – I think it's easier than the Direct.Gov website'

'It's great to have all the tools easily available on one website'

2.44 A number of participants told us however, that whilst the site was easy to navigate, the use of video clips would help further in providing practical examples of how the site could be used. For some participants the availability of video clips appeared to be an expectation for a modern website.

2.45 Other participants felt that it would be useful if specific tools could be promoted or highlighted at particular times, depending on a person's place on the customer journey. For example, the course finder tool could be promoted to users prior to the enrolment period. A significant number of the focus group participants said that they had originally seen the previous version of the skills account website and hadn't returned to their skills account since first logging-on (confirming findings from the telephone survey). Feedback from learners suggested that skills accounts were promoted primarily as a mechanism to access Level 3 funding and the full benefits of skills accounts were therefore not always apparent to learners. Future research will seek to investigate whether the new website leads to more frequent skills account use. Early evidence, however, appears to suggest that the new website may well have a positive impact on overall frequency of use of the skills account website.



Conclusions

2.46 The following conclusions can be drawn from the latest telephone survey (supported by findings from focus groups):

- The percentage of individuals who thought that skills accounts were a good idea remains very high at 94% (up from 93% in the previous survey). Just over 70% thought that skills accounts were helpful for them personally.
- Overall satisfaction with the skills account service is similar to the previous survey and remains high (66% of respondents were very satisfied or fairly satisfied in both surveys).
- The percentage of individuals who thought that skills accounts were very easy to use or easy to use has remained unchanged at around 89%.
- The percentage of respondents who felt that they had a choice of different learning providers was higher amongst skills account holders (53%) than amongst non-skills account holders (43%).
- Over three quarters of survey respondents thought that including traffic light ratings within a skills account would have an important impact on their decisions about choosing a course or provider.
- Frequent users of skills accounts are more aware than others of the Government contribution towards the cost of learning. However, frequent users in the survey were less willing to invest their own money in learning than occasional users (51% compared to 56%). This may be because frequent users are more likely to be young adults, who may have less spare cash. Alternatively, a higher proportion of frequent users may be planning to take a course or change their career in the near future and this may have an impact on their current financial position.
- 53% of frequent skills account users have told someone else about skills accounts compared to 39% of occasional users. Frequent users are more likely to be satisfied with the skills account service than occasional users (85% compared to 82%).
- The overall usage of the skills account website is fairly low, with over 30% of individuals with an activate account unable to recall using it. Of those that can recall using the website, more than half never return after their first visit.
- A follow up survey of skills account holders, that were first contacted in the summer of 2009, also shows that a high proportion of individuals do not continue to use their skills account. In the follow-up survey those who regard themselves as frequent or occasional users has dropped from 60% to 30%.



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- When individuals visit the skills account website for the first time they need to gain a very clear appreciation of how a skills account is going to benefit them personally. If this is not apparent they are much less likely to return.
- However, even when the benefits are clear, frequent use of the site is much more likely to occur at particular times – typically when an individual is actively looking for a new course.
- The likelihood of frequent use of the skills account website is also increased if the individual had help activating their account in the first place.
- Frequent and active users of the skills account website, who are taking a course, appear to be more satisfied with their course or training programme than other individuals taking a course.
- Older adults are slightly less satisfied with the skills account service than younger adults. This seems to be partly due to less experience and/or confidence with IT. A more significant factor, however, is that older adults are less likely to be planning to take a course in the near future, so perceive that a skills account has less relevance for them.
- The new skills account website has generally been well received and the ‘wheel image’ was thought to make the site easier to navigate.
- A number of focus group participants thought that the addition of video clips would provide practical examples showing how the website should be used.
- It is possible that the new website might lead to more frequent use but it is too early at this stage to make a judgement about this.



3. Integrated Employment and Skills (IES) Trial

Introduction

3.1 The West Midlands was one of the first regions to pilot the Integrated Employability and Skills (IES) initiative. The aim of the IES trial is to build on the current welfare and skills systems so that all of those out of work get the integrated help they need to address their skills needs, find employment and progress in work through continued training.

3.2 A component of the IES initiative is the Employability Skills Programme (ESP) which is an ESF (European Social Fund) co-funded programme aimed at adults aged 18+ and provides employability training for 20 hours per week for up to 15 weeks. The provision has been designed to offer unemployed adults the opportunity to achieve an employability qualification that develops all areas of returning to employment. The course offers the opportunity to work closely with an employment consultant and also provide the opportunity for job tasters and work experience.

3.3 The average level of learning on the ESP is at Entry Level and Level 1. In the majority of providers, learners are directed through the skills account website and assisted in the registration process. Therefore this aspect of the evaluation provides a good contrast to the Level 3 trials in terms of the levels of ability of the learners and the different needs of the two groups in terms of their expectations of their skills account.

3.4 In the West Midlands region it was decided to incorporate the introduction of skills accounts into the ESP and during the programme learners would be given the opportunity to open a skills account.

3.5 It is important to note that this aspect of the evaluation is focused on the effectiveness of integrating the skills accounts into the ESP. It is not evaluating the effectiveness of the joint LSC and Jobcentre Plus IES trials. The evaluation of the skills account within the ESP is a longitudinal assessment which commenced in summer 2009 and will continue through until December 2010. This report covers the initial evaluation which took place in summer 2009 and focused upon the integration of skills accounts within the ESP from a provider perspective and also the initial views of learners on its relevance and appropriateness.

Note: The research took place prior to the launch of the new skills account website in November 2009 so comments in this section of the report (particularly regarding website usability) refer to the previous version of the website.



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3.6 The summer 2009 evaluation involved three different elements. During June and July face to face interviews were held with nine of the ten contracted IES providers participating in the ESP in the West Midlands. The interviews sought to gain information on the management, operation and implementation of skills accounts into the ESP programme. To gather the views of learners a focus group was held with learners at one of the providers and later in the summer the telephone survey of skills account holders included individuals who had opened a skills account whilst on the ESP. Both the focus group and telephone interviews tested the relevance, appropriateness and usability of skills accounts for this particular client group.

3.7 For the depth face to face interviews with providers RCU produced an issues list which was approved by the LSC and sent to the organisation in advance of the meeting. This ensured that essential topics were discussed with all providers yet allowed sufficient flexibility for additional issues considered to be important to be discussed during the meeting. Interviewees usually included the contract manager responsible for operating the ESP and depending on the size of the organisation, the tutor responsible for delivering the programme. The focus group contained four learners aged between 26 and 54; direct comments from the focus group participants are included in relevant sections of this report.

3.8 Following the summer 2009 evaluation period, a summary list of key findings and issues was produced.

3.9 A second period of evaluation will commence in March 2010 when the ESP providers will be re-contacted and the evaluation will focus on how the skills accounts have become embedded into the ESP following the initial period. It will also focus on how the development of the skills account online facilities are assisting this particular client group and what more could be done. There will also be further focus groups with ESP learners and the telephone interviews will include skills account holders who have opened their account via the ESP programme.

3.10 During the second phase of this evaluation Jobcentre Plus and **nextstep** providers will be invited to participate in depth interviews in order to obtain a complete perspective on the introduction of skills accounts into the ESP.



Impact of the Trial on Providers

Provider Characteristics

3.11 The providers involved in the West Midlands IES pilot varied in size, organisational structure and geographical location. Each of these factors impacted on how skills accounts were embraced within the ESP.

3.12 The size of the organisations engaged in the West Midlands pilot varied significantly from large private learning providers such as PeopleServe where such providers operated on a national basis and managed national contracts on behalf of the Department for Work and Pensions and Jobcentre Plus to small providers who delivered employability training to people within the local labour market.

3.13 These larger providers had the biggest groups of ESP learners, employed contract managers that were dedicated solely to delivering the IES contract, operated from multiple sites across the region, employed tutors specifically to deliver the ESP and were well resourced with high quality ICT (information and communications technology) and broadband access.

3.14 There was a second type of group of providers that were public sector organisations with a long history of delivering programmes to support disadvantaged young people and adults. They had also provided rapid response programmes for large-scale redundancies. These public sector organisations also had long standing relationships with the LSC and Jobcentre Plus and were highly experienced in managing public contracts.

3.15 The third group of providers were small, third sector organisations with a very local focus. These organisations often served rural or market town areas and the volume of learners on the ESP was low. Staff in these organisations often had multiple responsibilities and job function of which ESP was just a part. Resources in these organisations was limited, (particularly ICT) which impacted on how skills accounts could be incorporated into the ESP.

Provider Approach to Integrating Skills Accounts within the ESP

3.16 How skills accounts were integrated within the ESP was highly dependent on the type of organisation delivering the programme. As indicated previously the large private providers were, in the main, serving large urban areas which tended to have relatively high levels of deprivation, including unemployment.



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3.17 The volume of clients directed to these providers by Jobcentre Plus was sufficient to permit the company to put together dedicated teams of staff, which included an ESP contract manager, a dedicated tutor, dedicated classroom space including PCs for each individual learner or at the most for pairs of learners working together. Often the classroom would have an interactive white board and good quality broadband access, which allowed the tutor to log onto the skills account web site and utilise its content.

3.18 In large providers there were sufficient volumes of learners to allow the ESP to be delivered to two distinct groups of learners according to their needs. When learners are referred from Jobcentre Plus to the large providers they each undergo an initial basic skills assessment, which is primarily focused on literacy rather than numeracy. The results from the tests would identify which ESP group is most suitable for the individual.

3.19 The first group, referred to as the foundation group is for individuals with high basic skills needs and their appropriate level of study is Entry Level 1 – 2. These learners have poor literacy and usually no ICT skills. In one provider, the levels of basic skills amongst this group was so low, due to the majority of learners with ESOL needs, that a decision had been taken not to include the skills account into the ESP, as all aspects of the skills account website was beyond the comprehension of these learners.

3.20 The second ESP group, referred to as the employability group, is aimed at those learners with an appropriate level of study at Level 1 and 2 where there are still literacy needs and low ICT skills, but learners can work individually on some parts of the ESP programme.

3.21 In the smaller providers serving rural or market town areas the volume of referrals from Jobcentre Plus was very low and would not sustain dedicated teams or tutors. The ESP group would be taught in a generic classroom setting often with few PCs and no online access for the tutor to use during the classroom settings. Clearly this restricts the opportunities to use the skills account website during the ESP.

3.22 The limited volumes of ESP clients did not permit two separate ESP groups to operate and there is a single group of learners of mixed ability being taught together. Added to this fact is the issue that the ESP is a roll on and roll off programme⁸ which meant the tutor had a difficult task to ensure each learner had completed all aspects of the ESP within the specified 15 week period.

⁸ Individuals can start their programme at different times throughout the year and classes may include individuals with different start dates.



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3.23 In all providers, skills accounts were introduced to learners during the induction period at the start of the programme. However, induction is very comprehensive, covering an array of topics, so the level of details explained during induction was minimal. That said, in large providers with good IT facilities, the tutor emphasised the importance of the skills account to the ESP group and explained that it would be an integral part of the programme.

Introducing Skills Account within the ESP

3.24 The point at which skills accounts were formally introduced to learners as part of the ESP varied for a number of reasons. Two providers serving predominantly rural areas opened skills accounts for each learner by week two of the programme. These groups of mixed ability learners would open a skills account as part of their ICT training. The tutor explained that it was a slow and time consuming process because of the low ICT skills of the learners and because of the limited number of PCs available. The main purpose in opening a skills account was to fulfil the LSC request to register all learners for a skills account. Once this had been completed the skills account website and the information and facilities it contained was rarely, if ever, referred to or used during the programme again.

3.25 In larger providers the skills account was used as a fundamental learning support tool to enhance the employability award that the learners were working to achieve whilst on the ESP. The awarding body for the employability award varied across providers and therefore the most appropriate point to use skills accounts also varied accordingly.

3.26 The large providers were highly supportive of the skills account website as it provided an array of facilities that matched the requirements of the employability award perfectly. For example one provider explained that they refrain from opening skills accounts until week 5 of the programme. This is to coincide with learners undertaking Unit 5 of the ASDAN Employability Award (Career Exploration) because the skills account website is an ideal tool to help clients with job search techniques. It also encourages them to use the site for wider career planning purposes outside of the tutoring period.

3.27 In large providers tutors of ESP groups would use the skills account website as part of their teaching several times a week. This was to get learners familiar with the site, reduce apprehension about using online facilities and to encourage the learners to access the site outside of the tutor session.



3.28 All providers' use of the skills account website focused on those facilities that supported job searching rather than learning. This is predominantly because the prime purpose of the ESP is to get unemployed people back into sustainable employment. The facilities that tutors explained they used most were the C.V. Builder, the Job Profiling tool and the Job Descriptions. In several providers tutors would use these tools to help learners develop their C.V. for a specific job they wished to apply for. The job profiling and descriptors help them to describe their own skills and experience against the essential and desirable elements of the job described on the skills account web site.

3.29 All providers were concerned by the length of time it took learners, regardless of their ability, to register for a skills account using the website⁹. In almost all situations skills accounts were opened as group exercises and for a group of between six or eight learners this would take on average 90 minutes to complete. This was because learners struggled to understand the language used on the site, had very limited IT skills and found the password and login process extremely difficult. Ninety minutes was regarded as a significant amount of time taken out of delivering the ESP curriculum which is in its own right is a very busy programme.

The Collection of Management Information

3.30 All providers are supplying the LSC with the management information data requested. This is a basic monthly return which includes the number of skills accounts that have been opened and the number of learners who have refused to open a skills account including the reason for refusal. For most small providers no additional management information is collected.

3.31 Larger providers usually have more elaborate internal management information systems and skills account learners have personal details and other information included on the providers in-house system. In one provider the internal management information system recorded the learner's progress on the ESP at weeks 3, 6, 9 and 12. It captured which elements of the skills account website had been reviewed and also recorded the learner's and tutor's comments about progress during the ESP.

⁹ The research took place in the summer of 2009, prior to the launch of the new website in November.



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Communication with the LSC

3.32 All providers had attended the initial training session provided by LSC West Midlands. At that event the providers had been introduced to the concept of skills accounts and the different aspects of the skills accounts web site. Providers were then given the opportunity to access the web site and ask any questions. Providers have not been brought together as a single group since that event. Although providers did say the LSC West Midlands office had responded to direct questions very quickly.

3.33 All providers commented that they do not receive any feedback from the LSC regarding their monthly returns and the number of skills accounts that have been opened. Large providers delivering contracted services are familiar with having regular progress reviews and minimum levels of performance which are absent from the current ESP. Several providers said they would welcome the creation of an ESP provider forum where providers can meet to share good practice, voice concerns and recommended improvements.

Issues Related to the Implementation

ESP Staff Response to Skills Accounts

3.34 Initial reaction to skills accounts in all providers was that it would create much more work into an already busy curriculum over a short 15 week period. In terms of the time required to open skills accounts with individuals that initial concern remains and needs to be addressed. However, beyond that initial concern, staff opinion varies dependent on the provider type. Dedicated ESP tutors in large providers delivering the programme to several groups were often supported by an ESP contract manager or co-coordinator. Often these staff had produced concise guides for tutors that explained the linkages between a skills account and the employability award they were delivering via the ESP. It also showed how the skills account website content could be used to support the delivery of the course.

3.35 In these situations the tutors valued the skills account and regarded it as a step forward and an enhancement to previous employability programmes. The positive comments made by interviewees regarding the skills account website included:

- *'All the facilities that are required for teaching an employability programme are all together on a single website'*
- *'There appears to be more content on the site each time I log on'*



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- *'Staff like it and are encouraging learners to use it'*
- *'Tutors like the site because its content can be used as group activities but also encourages self directed learning particularly around the job search functions'*
- *'Most staff that have come from an employment coaching background have reacted positively because the site is very job search focused'*
- *'Basic skills tutors like it because there is a lot of content that is geared to support learning'*
- *'It offers a new approach to job searching and can help to support self directed searching although very few would log on away from the training centre'*

3.36 Tutors in smaller providers with limited IT facilities and who taught several different programmes and therefore had less time to devote to learning about skills accounts and the website were less enthusiastic. This was more of an issue linked to limited exposure to the website and the absence of supporting materials which large providers had produced. They were positive regarding the concept and content of the website.

3.37 Direct comments regarding issues which did concern staff from all forms of provider included:

- *'The benefits of the site for people with poor literacy and IT are limited unless they are supported by a tutor'*
- *'Generally its nice but would be nice to have more graphics and make it more commercial looking'*
- *'Could you customise a learner's skills account and add favourites and online personal sites'*
- *'The information needs greater clarity and substance particularly around progression and any financial entitlements available'*
- *'Some long term unemployed learners do not believe what the site contains, they have experienced the assessment and benefits system several times before and are sceptical anything will support them into employment'*

Learner Response to Skills Accounts (Focus Group)

3.38 The learner response to skills accounts is heavily influenced by the approach adopted by the individual tutor. A tutor that is positive towards the whole concept of skills accounts and uses the website regularly in the classroom passes on that enthusiasm to the learners. These learners consider the skills account website to be a useful and supportive tool that helps them find employment. Where the tutor has had less exposure to the website and the only engagement is in registering learners for a website, which is regarded as negative, then the



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tutor portrays ambivalence towards skills accounts and therefore learners will not be given the opportunity to look at the site and utilise all the facilities that it contains.

3.39 On the whole there has not been a reluctance to register for a skills account. Any reluctance is diminished where the tutor promotes the website in a positive manner and has used the site on several occasions as part of the ESP prior to the point where it is appropriate for individuals to register for their account. The general questions asked by learners regarding registering for a skills account included the following:

- What is the purpose in registering?
- What is it exactly that I am registering for?
- Will it cost anything?
- Can I access this at home?
- Can I use it when I have finished the course?
- How much money can I get?
- Can I use the site when I am not at the centre?
- Who will help me when I am not at the centre?

3.40 Providers only reported a small number of instances where learners questioned why they should load personal data onto a government website. Similarly, very few learners had refused to register for an account. The refusal was usually due to the individual possessing very low level ICT skills and they were frightened to register. Often these learners were insistent they couldn't or wouldn't ever use an online site and therefore didn't see any point in registering.

3.41 Feedback from the focus group which was held at one of the larger providers that attempts to integrate the skills account into the ESP and the employability award provided an insight into learners views of all aspects of the skills account and not just the concept of skills accounts. The focus group took place in the summer of 2009 prior to the launch of the new website. The first comments are related to individual reasons for being on the ESP.

- *'I did a test at the Job Centre and they could tell my score was low so they told me about the course and said I should come here to get better'*
- *'I'm doing literacy and numeracy, trying to do Level 2 so I can go to college'*
- *'I'm studying reading and writing and would like to go to college to become a hairdresser'*
- *'I'm doing literacy and numeracy Level 1 and then would like to move on to do computer skills because I'm looking for a job – I used to be a carpenter but can't do heavy work because of an injury'*



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- *'I've done Level 1 and 2 in numeracy and literacy and now I'm trying to do Level 3, I want to do landscape gardening'*

3.42 With regard to their experience about the ESP course they were currently on, the comments were:

- *'It is great here – the teacher is very good'*
- *'They are really friendly and will help you search for a job'*
- *'They are helping me with my spoken English'*

3.43 The low level of literacy skills of the learners had a significant impact on their perception of the skills account website. Comments included:

- *'We need help from the teacher to go through everything because some of us can only read one sentence at a time'*
- *'We understand if we go through it in the classroom – it is really hard to use the website because we can't read it, we wouldn't use it on our own'*
- *'It is really hard to do – I couldn't do any of it myself, I'd never use it on my own'*
- *'We only ever use the website here when we have the trainer helping us'*
- *'I find it hard to use computers anyway without the reading'*
- *'It is a shock to you looking at all that writing – you think what am I going to do'*
- *'It takes you half an hour to read one sentence – it gives you a complex and brings you right down on yourself when you can't do it'*
- *'Some have access to the internet at home but rarely use this as it is too difficult to make sense of the content and navigation process'*
- *'I can't make sense of this at all – we don't know what half of these words are – it needs to be made simple, like for a kid'*

3.44 A number of learners felt that greater use of pictures would have made the website easier to use. Comments included:

- *'The website is too old for us – there needs to be more pictures so we understand'*
- *'We need a smaller amount of writing with more pictures'*

3.45 The Search Courses Tool

This was felt to be useful, but would be difficult to use outside of a supported environment.

Specific comments from learners included:

- *'There weren't any courses on here that we could do at the moment – we need to do more work before we can get on the courses'*
- *'After a bit this bores me and it's too hard to understand'*



3.46 The CV Builder

Learners are not required to build their own CV at this skill level but a CV is developed with their trainer as part of the course. Whilst the CV Builder was not part of the skills account itself, this tool was accessed by learners via a link from the skills account site to the Careers Advice Service page. The step by step process was welcomed although the 12 stage process was felt to be too detailed for some. Respondents were able to understand most of the questions relating to the CV Builder but practical application would need to be in a supported context. Suggested improvements were voice explanation in different languages and a translation tool to translate the text on screen into different languages. Specific comments from focus group participants included:

- *'I've had a C.V. done for me on all the courses I've been on and then it just gets updated each time – we don't need to start all over again if we've been on a course before'*
- *'Our trainer would fill all of this in for us and talk to us while she was doing it – we wouldn't be able to do it on our own'*
- *'It would be better if it was shorter – it takes a long time'*
- *'It would be good if there was a smaller amount of information'*
- *'How about someone talking you through everything on the machine – they could explain everything using a voice'*

3.47 The Job Profiles Tool

Some of the statements were felt to be too advanced in this tool and the bar graph information was difficult for some participants to understand. Comments included:

- *'It was hard to answer until our trainer explained and read them all out to us'*
- *'The trainer explained the questions so most of them were OK but some still didn't make sense'*
- *'They need to say some of these in a different way for us so we really understand'*
- *'There needs to be easy wording and less questions – maybe someone speaking each of the questions on the computer'*
- *'It takes too long – there should be a short and long version so we can choose the easy one'*

3.48 Final General comments from focus group participants:

- *'Keep it simple and easy with less information'*
- *'Get rid of the website and do something different – have DVD's instead for us'*
- *'This is for more educated people than us'*
- *'We would rather have it all in the classroom and on CD's and DVD's instead'*



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- *'This website is for people who are brainy – it makes you feel low on yourself and worthless – you get frustrated if you don't understand, I'd want to bust the computer up'*
- *'It is better in the classroom because you get told if you are doing something well and doing it right'*

Learner Response to Skills Accounts (Telephone Survey)

3.49 Learners who had opened a skills account through the ESP were part of a two phase telephone survey. The December 2009 survey included 650 learners and the January 2010 survey a further 550 learners giving a total base of 1200 learners. Of that base, 105 were identified as having a skills account via the ESP. Clearly this is a small sample and therefore detailed charts and a table comparing the two groups are not statistically robust and therefore not appropriate. For the majority of questions the ESP learners gave very similar responses to the 1200 sample. The 105 telephone interviews with learners who had opened a skills account via ESP is too small a sample size to break down into further analysis by gender, ethnicity, age etc.

3.50 Apparent variations in opinion between the overall sample group and the ESP learners included the following (percentages are shown in figure 20 below):

- Slightly fewer ESP learners can recall using the skills account website compared to the main sample body which is of slight concern given that accessing and using the skills account website is often a core element of the ESP course.
- A much higher proportion of ESP learners received help in activating their skills account compared to the main sample body which does reflect how skills account are used as part of group exercises within the ESP course and the role of the course tutor in providing assistance in setting up individual skills accounts.
- A slightly higher proportion of ESP learners are likely to access their skills account in the future compared to the main sample body and 99% of the ESP learners considered skills accounts to be a good idea which is slightly higher than the main sample body.
- A higher proportion of ESP learners consider their skills account to be helpful to them personally than the main sample body and a higher proportion are also either very satisfied or fairly satisfied with the skills account services than the main sample body.
- Far fewer ESP learners have told anyone else about skills account than the main sample body, which could be due in part to the fact that they are introduced to skills account whilst on the ESP which they do not wish to disclose to friends.



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**Figure 20: December 2009/January 2010 Telephone Survey Responses
(ESP and All Respondents)**

	Overall	ESP	Difference
Do you remember using the Skills Account website?	71%	67%	-4%
Did you receive any help in activating your account?	35%	53%	18%
Would you be likely to access your account in the future?	84%	89%	5%
Do you think they [Skills Accounts] are helpful to you personally?	70%	88%	18%
Have you told anyone else about Skills Accounts?	34%	20%	-14%



Conclusions

3.51 The use of skills accounts within the IES trial provides a valuable insight into the usefulness and value of the website with this target audience. Whilst the research took place prior to launch of the new website in January 2009, a number of key conclusions can be drawn, highlighting strengths of skills accounts and further issues that may need to be addressed.

- The content of the website lends itself very well for use during group exercises and the content contributes directly to the requirements of the employability award. Embedding the use of the skills account website into the ESP programme enables learners to become familiar with the site, the facilities it contains and how it can be of help beyond the period of the ESP course. This type of approach is something that could be integrated into a wider range of courses particularly at Entry Level and Level 1.
- The skills and interests assessment were particularly useful for tutors during job search sessions. Providers reported that the results of the skills and interest assessment produced results that surprised the learner. The range of potential careers was much wider than the traditional jobs they have had in the past or thought they would ever be able to apply for. This gave learners self confidence and inspiration to think more positively about potential jobs in the future.
- The general IT skills of learners on the ESP are low and therefore their ability to log onto the skills account website and then navigate their way around the site is very limited. As a consequence this reduced the likelihood these learners will access their skills account outside of the course and without the assistance of a course tutor.
- Similarly, the overall use of language and vocabulary on the site is above the level of comprehension of many ESP learners. This also reduces the likelihood of these learners accessing the skills account website unaided. Consideration needs to be given to simplifying the login process and applying a SMOG test to the text included on the website to ensure it is appropriate for people with lower level literacy skills.
- Consideration should be given to including audio and video footage to support the text. This would assist learners with lower levels of literacy and IT skills to navigate



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around the site. This may also encourage these learners to return to the skills account unassisted and outside of the course.

- Both tutors and individuals found the skills and interest tool and the job profiles inspired learners to consider a wider spectrum of jobs than they had experienced to date. If the skills account website could then link these profiles to actual jobs available in their area via Jobcentre Plus or a commercial website would be of encouragement to these learners.
- A critical success factor in integrating skills accounts into the ESP programme is having a provider with the necessary IT resources with dedicated ESP tutors with experience of using the skills account website. For this to be viable requires sufficient volumes of learners on each ESP course. Therefore, in contracting for ESP providers, consideration needs to be given to the resources of the organisation, viability in class size and the skills and experience of the tutor.
- The positive attitude of the course tutor is critical to the success of integrating skills account into the ESP course. Having a 'can do' attitude and the ability to see how the skills account website content can add value to the ESP course and assist learners to achieve the employability award whilst on the programme is crucial.
- Providers requested that they would be interested in reviewing any changes to the skills account website before it went live. This was to give providers the opportunity to review the new content and adapt their ESP curriculum to accommodate the changes. Providers would also like to begin to use the skills account website on other programmes where they feel the content of the site would be a valuable tool to help learners.



4. Level 3 Trial

Introduction

4.1 The Level 3 trial provides an upfront and flexible extension to current learner support schemes available for learners taking full Level 3 programmes. The overall aim of the trial is to test whether this extended offer encourages individuals to participate and remain in learning.

4.2 In order to access additional funding, individuals need to open a skills account. The trial is being delivered in the South East and East Midlands by **nextstep** and (initially) the 20 Strategic Learning Providers who offered skills accounts in 2008/09 (through the universal offer).

4.3 The trial commenced in March 2009 and formally ends at the end of March 2010. However, supported learners who are on a programme at 31st March 2010 and whose learning goes beyond and up to 31 July 2010, will continue to be supported.

4.4 The specific objectives of the Level 3 trial are to:

- test whether additional financial support helps both attract and retain new learners;
- review the role of **nextstep** in referring new learners from new target groups and advising on extra financial support;
- test additional learner support programmes with new target groups;
- inform the future development of skills accounts, the Adult Advancement and Careers Service and learner support policies.

4.5 Phase 1 of the trial provided additional learner support funding for 2008/09 and 2009/10. This was a discretionary fund (called the *Skills Accounts Learner Support Flexibility Element*) that could be used directly by Strategic Learning Providers to help individuals overcome any barrier that might prevent them achieving a full Level 3 qualification. Examples of possible support included childcare costs, travelling expenses, books and equipment and course fees.

4.6 Phase 2 of the trial started in August 2009. This phase of the trial was specifically designed to test the role of **nextstep** in advising on extra financial support and providing learners with an upfront offer. **Nextstep** advisers identified an individual's eligibility to receive support, during an initial interview, using a specially developed online *Eligibility Checker* tool



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(referred to on the website as the Learner Support Tool). Following the **nextstep** interview individuals would then be referred to a learning provider, together with a statement/proforma on their possible Level 3 eligibility. Providers would then determine the amount of funding that an individual would receive.

4.7 Possible funding that could be accessed in Phase 2 included the *Skills Account Learner Support Flexibility Element* (as in Phase 1) and an extension to the existing *Adult Learning Grant* (ALG). ALG is intended to help low-income adults studying full time (450 guided learning hours over the academic year) with the costs of learning. The pre-existing grant pays up to £30 per week (subject to financial assessment) for learners aged 19 and over who are studying for their first full Level 2 or first full Level 3 qualification. As part of the Level 3 trial, the ALG eligibility criterion for “firstness” was flexed. This opened up the scheme to individuals who already had a full Level 3 but who wished to achieve another in one of the key sectors identified by the participating regions. All of the other ALG eligibility criteria remained the same. Learners accessing the extended ALG offer needed to apply for funding using the standard ALG process, with the Level 3 trial eligibility proforma identifying their additional entitlement.

4.8 At the start of the trial the LSC specified that funding support should be targeted at key sectors identified by the participating regions and courses which are specifically vocational rather than purely academic. There was also an intention to target “hard to reach” categories (such as learners who require additional help with childcare costs, whom the provider believes may be at particular risk of dropping out) and those at risk of redundancy and/or in need of re-skilling.

4.9 The Level 3 trial is a short term initiative designed to inform the future development of skills accounts, the Adult Advancement and Careers Service and Adult Learner Support. The additional support available through the trial will not be extended to other regions or extended beyond the dates set out for the trial. The evaluation therefore focuses on key issues and questions that will inform the larger strategic programmes.

4.10 Evaluation activities included interviews with **nextstep**, Strategic Learning Providers and key LSC staff. In addition two focus groups were conducted with learners who had received funding support through the Level 3 trial. Where appropriate, evidence from the national telephone survey also informed the evaluation. Research activity took place between September 2009 and February 2010.

4.11 This evaluation report was compiled in January 2010, more than two months before the end date for the trial. The report is therefore a snapshot of current findings. For this reason the report focuses on key issues rather than quantitative data (numeric data is likely to be incomplete at this stage).



Impact of Learner Support Flexibility Element on Learner Participation

4.12 At the end of January 2010, the total anticipated expenditure for Phase 1 was £3.7 million out of a total allocation of £4 million, with 552 learners receiving support. It is likely that by the end of the trial the vast majority of the allocated Phase 1 funding will have been committed. The flexibility element was used for a variety of different purposes and providers welcomed the local discretion over the payments (criteria for standard Discretionary Learner Support Funding were applied). In the first 6 months of the trial, for example, the categories of support delivered through the flexibility element included course fees, childcare, travel expenses, books and other equipment. The Level 3 trial also provided some additional administrative support.

4.13 Learners accessing Level 3 funding were taking a wide variety of different courses, with over 50 named qualifications in the East Midlands alone. The most popular courses were Access programmes, followed by BTEC National Diplomas and Certificates. Full time NVQs accounted for only 6% of learners. The most popular subject areas were Hairdressing, Beauty Therapy, Nursing and Access to Higher Education with significant numbers also taking Engineering, Computing and Business related courses.

4.14 Providers told us that they welcomed the *learner support flexibility element* and that the funding had made a difference to learner participation. Many providers felt that the Level 3 funding was particularly valuable because existing discretionary learning support funds were struggling to meet the growing demand and that this new fund allowed them to support a group of learners who may well have missed out. One provider for example told us:

'The Level 3 funding has had a very positive effect as it has meant real help for people. For example students on the full time Access programme and on the Intensive Hairdressing programme often have significant financial issues that need to be addressed'

4.15 Many learners also reported the positive impact of the Level 3 funding. One individual, for example, who received help with course fees, said:

'The extra funding is really important to me. I wouldn't be here without it because my course is so expensive'

4.16 Learners also gave an insight into the diverse ways in which the funding was being utilised. One individual explained, for example, how Level 3 funding was used to purchase course related equipment:

'It's definitely been a massive part for me because I've been wishing for this kind of keyboard for 10 years now, but I've never had a real job to purchase one. So when I finally



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got this keyboard and headphones, it's a big plus because I can finally go into being a producer. It's helped me get the equipment I need at home'

4.17 Whilst learners welcomed the additional funding about half of the learners that we spoke to said that they would still have participated even if the funding was not available. Most learners told us that financing their learning was a secondary consideration to achieving their qualification. However, without the additional funding many learners said they may have faced significant financial problems and it is possible that this might have had an impact on their ability to stay on the course.

4.18 The learners that we spoke to first became aware of the availability of financial support through the college student services departments. Many learners were unaware of the total amount of financial support they had received (e.g. for course fees) and some were surprised by the total level of support. One individual who received travelling expenses said:

'I was surprised by the amount of money I was given to stay on the course and to help me with my travel - I live 25 miles away from the college'

4.19 The focus groups feedback suggested that the *learner support flexibility* element within the Level 3 trial provided real and tangible benefit to many learners and that in Phase 1 it was relatively easy to access and administer (being available directly through learning providers). The relatively high take up of Phase 1 funding is evidence of the benefits of this "provider-led" approach. However, there is also evidence that some of the funding, whilst "nice to have", did not in itself always increase participation but was just one factor amongst many that influenced whether an individual accessed a course and remained on it.

The Level 3 Offer and Skills Accounts

4.20 All learners that we spoke to told us that in order to access the Level 3 funding they needed to open a skills account. For example one learner said:

'If you wanted student services to help you with funding you had to first of all go through the process of getting a skills account'

4.21 However, many learners had not accessed their skills account since initially signing up and many were unsure about the features and benefits of skills accounts. In general, skills accounts were seen as a necessary hurdle that they had to jump through in order to access funding rather than specifically and meaningfully linked to the funding offer.

4.22 The overwhelming majority of providers felt that the skills account initiative had been significantly boosted by the Level 3 trial and the additional Level 3 funding provided them with



a tangible offer that they could use to promote skills accounts. However, providers themselves (like learners) saw little connection in practice between the Level 3 funding and skills accounts.

Impact of Providing an Upfront Offer Through Nextstep

4.23 Phase 2 of the trial tested a very different model to Phase 1. It was anticipated that in Phase 2 individuals would receive an upfront offer of learning support from an independent **nextstep** adviser, using the online eligibility checker tool. Individuals would then take a summary proforma of their entitlement to a learning provider. Possible support that could be identified would include the extension to ALG (to include a second Level 3), Childcare (Free Childcare for Training and Learning for Work - FCTLW) as well as the learner support flexibility element.

4.24 This approach, in theory, is a “demand-led” way of working and offers the opportunity to test whether an upfront offer to the individual has an impact on learner motivation and commitment and increases the perception of customer choice. Skills accounts within this model potentially provide the “market information” that can inform this customer choice (using the course search and job search tools). In addition skills accounts are able to maintain a record of an individual’s learning programme and the government funding that they will have received.

4.25 In practice, however, the volume of learners accessing support in this way was initially low and the take up of funding at the start of the academic year was minimal. By the end of January 2010 Phase 2 activity had increased substantially, largely due to additional actions taken by the LSC and providers (discussed later in this report). At the end of January anticipated expenditure was £2.7 million with 490 learners supported. There are a number of possible reasons for the initial low take up of the upfront offer and these are discussed below. Understanding these (and other issues related to Phase 2 of the trial) provides important insights that can help inform the development of skills accounts and advice and guidance services for potential Level 3 learners.



Advice and Guidance for Level 3 Learners

4.26 Level 3 learners that we spoke to received information about courses from a wide variety of sources but were in general unlikely to use **nextstep**. In many cases the first option for learners was to contact their local college or to search the Internet for information. Typical comments from learners included:

'I was looking at different types of things after I lost my job and saw that the college did this course so I came in for an interview to see if could get a place'

'My dad told me about this college because he was trying to find a suitable course for me. We just called them up and arranged an interview – although it wasn't really an interview. It was just showing me around the college and telling me what to expect. They were really friendly and very helpful'

'I used the Internet in the first place to look for colleges and to find out what was happening in the catering industry. I then came to the college Open Evening, took away a prospectus and a few weeks later booked a place on the course'

4.27 Most learners had a very clear idea about their career aims and the reason why they had chosen a particular course. At Level 3 this often involved progression to University and many learners were very keen to find out more about higher education options. Some learners however had specific plans to set up their own business or to gain vocational skills in order to follow a particular career path. Comments from learners included:

'I'm doing a National Diploma in Film and Television Production. I am hoping to go to University next September'

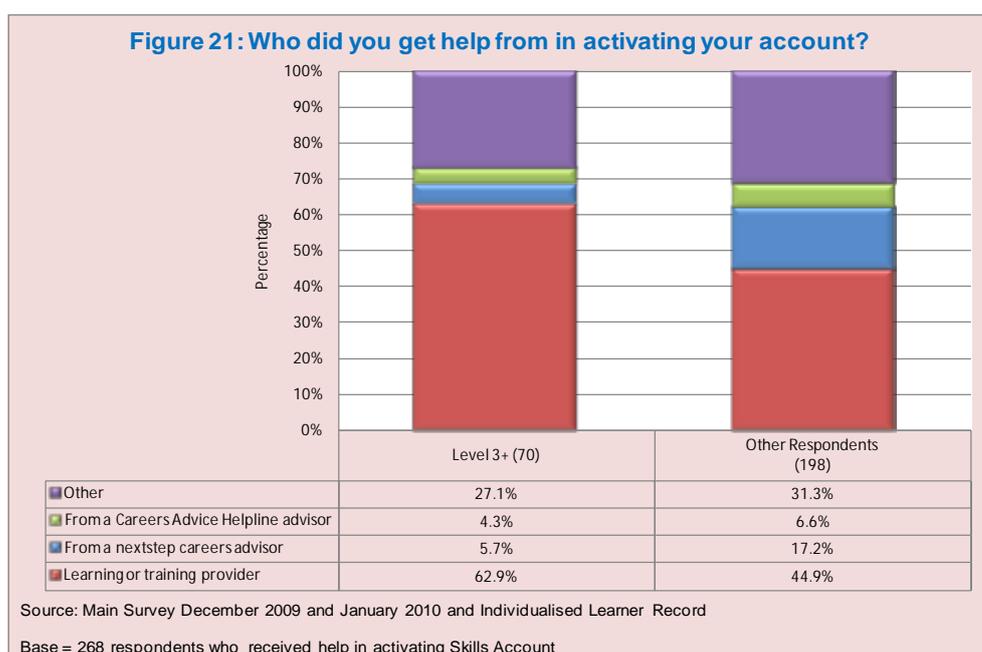
'I'm studying photography, and did a Level 2 course last year. I'm hoping to use this course to eventually become a cameraman'

4.28 The skills account telephone survey confirms that individuals looking to study at Level 3 (or higher) are much less likely to use the **nextstep** service than individuals with lower levels of qualification. The chart below, for example, shows the percentage of individuals who received skills account support from learning providers, **nextstep** and the Careers Advice Service helpline respectively, by level of qualification subsequently taken. Whilst 17% of respondents at Level 2 or below would have received support from **nextstep**, this drops to only 6% for individuals intending to study at Level 3 or higher.



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4.29 **Nextstep** staff also felt that the trial should have been focused on colleges and told us that the service has limited experience of dealing with individuals who are potential Level 3 learners. **Nextstep** told us that they tended to concentrate on individuals with lower level skills who need careers advice in order to access employment.

4.30 A number of FE Colleges taking part in the trials were also **nextstep** centres, making the process of accessing Phase 2 funding much simpler for them. In November one of the regions taking part in the trial extended the scheme to include all colleges with **nextstep** centres (as well as 3 other colleges in urban areas) and this action significantly increased the uptake of the funding in the region.

4.31 In order to address the issue that potential Level 3 learners often apply directly to a college (rather than accessing **nextstep**) dedicated telephone help lines were setup in colleges so that potential learners could speak directly to a **nextstep** adviser. This allowed the adviser to use the eligibility checker tool and generate a proforma that colleges could then use to draw down the Level 3 trial funding. This process eventually led to an increase in the take up of funding. However the “work-around” meant that the processes were now very much provider mediated rather than demand-led (i.e. driven by the individual), as initially envisaged.

4.32 In summary, the trial suggests that potential learners receive information about careers and courses from a variety of different sources (both formal and informal) but are unlikely to have face to face interviews with **nextstep** careers advisers. Many individuals



apply directly to a learning provider and increasing numbers carry out initial research using the Internet. This suggests that online services such as skills accounts may have an important role to play in the future in providing online advice and guidance for Level 3 learners provided that face to face support is also available (e.g. from the provider) for those that require it.

The Operational Implementation of Phase 2

4.33 Providers felt that the low take up of Phase 2 funding could also be partly explained by a number of operational/implementation issues. In particular providers mentioned:

- The complexity and lack of clarity of the scheme. This included, for example, rules on which qualifications or sectors were eligible and which ones were not. During the trial the sectors eligible for funding were modified, in response to feedback from colleges.
- Whilst briefing of most **nextstep** advisers took place in August and early September, this was delayed in some instances due to unclear communication.
- The timescales were very short and there was little time for detailed planning. For many providers there is very little opportunity to recruit learners to full Level 3 programmes after September, so it is important that systems are finalised and tested well in advance of this date.

4.34 It is interesting to note that the largest uptake of Phase 2 funding in the South East came at Milton Keynes College, one of the providers who were not part of the initial skills account trial (the college joined the trial in November because they had an onsite **nextstep** centre). This provider felt that the scheme was straightforward and had very clear processes in place. Probably by this stage in the trial many of the early implementation issues had been sorted out and the college benefited from this clarity. Also, the college offered full Level 3 Access courses starting in January, so new learners were able to access the Level 3 funding.

4.35 A couple of colleges used Level 3 funding to employ a dedicated member of staff to coordinate the implementation of the trial in their organisation. This appeared to make a significant difference to the success of the trial and was particularly welcomed by the learners. In many instances the coordinator would contact learners after their course had started to inform them of potential eligibility for additional funding. These individuals also had a role in promoting skills accounts, offering for example, hands-on introductory briefing sessions for individuals, taking them through the details of the site.



4.36 **Nextstep** prime contractors that we spoke to were worried about the amount of time taken to carry out the initial interview and felt that it was difficult to do this in a standard 20 minute session. Another issue raised by **nextstep** was poor access to IT facilities in some of their centres and staff also felt that the details of the scheme were somewhat confusing and complicated. It should be noted, however, that the LSC produced a 1 page summary highlighting the key details of the scheme. Specific issues related to the use of the Eligibility Checker tool are discussed in the next section.

The Eligibility Checker Tool

4.37 Discussions about the development of an online Eligibility Checker tool started in October 2008, and this led an independent agency, PA Consulting, being commissioned to develop the tool in the first half of 2009.

4.38 The planned completion date for the Eligibility Checker was the end of May 2009, but in practice it was not fully implemented until 22nd July. **Nextstep** and providers were engaged in regular progress meetings about the development of the tool. The delay in developing the tool meant that launch events with **nextstep** advisers had to be delayed and the main September enrolment period was subsequently missed.

4.39 Feedback from the LSC, **nextstep** and providers (who are **nextstep** centres) suggest that the Eligibility Checker is easy to use and fully meets the final specification. The experience gained in developing and using this tool will undoubtedly be extremely valuable for future projects and in particular the roll-out of skills accounts. However, the usage of the tool has been quite low (particularly in the context that was originally intended).

Extension to the Adult Learner Grant

4.40 The uptake of the extended ALG offer (second Level 3) has been very low with only 75 individuals obtaining this grant by the end of January 2010. There are a number of possible explanations for this outcome:

- Lack of awareness of the offer by potential recipients. It was not feasible or realistic to undertake a large scale marketing campaign because it was a short term trial limited (at least initially) to a small number of providers. In addition the relatively late launch of the trial and availability of the eligibility checker meant that more localised awareness raising events were difficult to arrange. Late training for **nextstep** staff



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meant that some potential beneficiaries may not have been told about the offer even though in practice they may have been eligible and had a **nextstep** interview.

- The routing through nextstep. The pilot was designed to test the impact of an upfront offer via a guidance practitioner and the application approach designed with the assumption in mind. It is possible that many potential recipients taking a decision about learning made an approach direct to a learning provider rather than to nextstep, thereby by-passing the first part of the process. College enrolment staff approached by individuals may have been unaware of the offer because of this intended eligibility checking route.
- Confusion over eligibility. Potential recipients of the extended ALG offer were required to complete the normal ALG application form and attach the Level 3 trial proforma (confirming eligibility for the extended offer) to this application (failure to do this generated a 'rejection letter'). However, in hindsight a separate and distinct application form for the new offer might have been more effective. Individuals completing the normal ALG application form may well have received the impression from this form that they were ineligible – though this point is clearly linked to the training point above – the approach was designed assuming that each individual who applied would have an interview with a guidance practitioner before applying.
- It is possible that the demand for ALG funding for individuals who already have a Level 3 qualification is actually quite low. There is insufficient evidence from this trial, at the current time, to make this conclusion.

4.41 In order to boost the volume of ALG recipients, letters were sent in January 2010 to around 300 Level 3 learners who had previously been rejected by the ALG application process. The letter informed them that under the 'extended offer' they may in practice be eligible for funding and invited them to resubmit their application. The grant, if awarded, would be backdated to the start of the course. Whilst it is important that all individuals who are eligible for funding receive the money that they are entitled to, this retrospective action provides little additional information to inform the broader aims of the trial i.e. empowering individuals by providing them with an 'upfront offer' of learning support.



Conclusions: Implications for Skills Accounts and Adult Careers Advice

4.42 The overall aim of the Level 3 trial was to test whether an upfront and flexible extension to learner support schemes for learners accessing Full Level 3 programmes encourages individuals to participate and remain in learning. Phase 2 of the trial specifically looked at the role of **nextstep** in referring new learners and advising on financial support. The trial provides valuable insight that will help to inform the development of skills accounts and the Adult Advancement and Careers Service. Specific conclusions from the trial are:

- The flexible funding element was welcomed by both learners and providers and provided real and tangible benefits to a large number of individuals. In many cases the funding overcame financial barriers that would have prevented participation. However, about half of the participants in the focus groups told us that they would probably have participated anyway, even if the additional funding was not available.
- Level 3 learners that we spoke to were very clear about their career aims and were clear about why they had chosen a particular course. They had a strong motivation to succeed and financial issues were often secondary to them.
- Level 3 learners find out about courses and careers from a wide variety of sources, but in general are unlikely to use **nextstep**. The most widely used sources of information for these individuals appear to be the local college and the Internet.
- Uptake of Level 3 funding was greatest when it was channelled directly through colleges rather than being identified by the **nextstep** eligibility checker. However, this was largely because of the low usage of **nextstep** advisers and a number of operational factors (such as late availability of the eligibility checker, staff training etc.). It does not in itself provide evidence about the effectiveness of a demand-led approach, where individuals receive an upfront offer of support funding.
- The Eligibility Checker tool appeared to be effective and easy to use but had comparatively low usage throughout the trial. Whilst online eligibility tools may have important future potential, the low volumes in this trial provide little additional evidence for their application and future development.
- Strategic Learning Providers found that the Level 3 trial was an effective way of promoting skills accounts. The offer of “real money” added a valuable enhancement to the service, although in practice both learners and providers found that the link between the Level 3 funding and the skills account website was rather tenuous. A high proportion of learners did not continue to use their skills account after they had first opened it (possibly because learners at Level 3 already have clearly defined career and learning goals).



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- Many of the providers involved in the trial thought that various practical aspects of the trial were implemented late in the day, allowing insufficient time for appropriate planning, communication and training. As a consequence the scheme initially appeared over complex to some and it was difficult to provide an efficient process for September enrolments (this is to some extent a consequence of a “provider-led” system where internal planning timetables and processes often do not allow a rapid response to customer need).
- Increasing numbers of individuals at Level 3 are accessing course information from the Internet. The LSC should consider whether skills accounts should be the first avenue for information about learner support eligibility (rather than **nextstep**), using appropriate eligibility tools themselves. The system could automatically provide direct links through to course search and job profile sections of the website, enhancing customer choice and motivation.
- Feedback from learners suggested that skills accounts were promoted primarily as a mechanism to access Level 3 funding and the full benefits of skills accounts were therefore not always apparent to learners.



5. Recommendations

Introduction

5.1 It is now just over a year since skills accounts were first launched. During this time over 40,000 individuals have registered for a skills account and the facilities and functionality of the website have continued to evolve and expand. The future plans for skills accounts are ambitious. The latest Government White Paper *Skills for Growth* (BIS, November 2009), for example, states that *'new skills accounts will empower learners and will enable them to plan and invest in their own futures. By giving learners greater power to choose among courses we expect quality to rise'*.

5.2 This report has looked at the extent to which the aims of the skills account trials are being met. A telephone survey of 1,200 skills accounts users has provided detailed evidence on the universal offer for all adults. The evaluation has also investigated how skills accounts are being used with Jobcentre Plus customers on the IES programme, many of whom have basic skills needs. It has finally looked at the Level 3 trial, where through the skills accounts initiative, additional learner support funding has been made available for learners taking full Level 3 programmes. Together, these different audiences provide an extensive overview of the ways in which skills accounts are operating.

5.3 Listed below are a set of general recommendations for the LSC, resulting from the outcomes of the research, which may help to support the development of skills accounts in the future.

Recommendations

1. The LSC should consider including audio and video clips on the skills account website. This would provide a number of practical benefits, including:
 - Improved accessibility for individuals who have low literacy skills. Video clips could help these individuals navigate more effectively around the site
 - The provision of examples and case studies, illustrating the practical benefits of skills accounts for different target audiences. A video clip of a Level 3 learner, for example, might illustrate how a skills account could be used to find information on Foundation Degrees. A video clip of an employed adult might illustrate how the learner record could be used to store details of continuing professional development. The research



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evidence has suggested that individuals will only return to the skills account website if they can understand how it will benefit them personally and the provision of video clips on the home page will help to achieve this.

- Greater usability and interactivity. Many individuals now have an expectation that websites will contain audio and video links.
- 2. The LSC should consider applying a SMOG test to the text included on the website to ensure it is appropriate for people with lower level literacy skills.
- 3. Providers should consider embedding the use of skills accounts into mainstream activity such as tutorials and teaching sessions. Research evidence suggests that practical hands-on support with skills accounts can have a significant impact on how frequently it is used. The IES trial has shown how skills accounts can be successfully embedded into the ESP programme, but this could be extended to teaching and support at all levels.
- 4. The LSC should consider whether skills accounts should be the first avenue for information about learner support eligibility for Level 3 learners, accessing appropriate eligibility tools themselves directly from the website. The system could automatically provide direct links through to course search and job profile sections of the website, enhancing customer choice and motivation and helping to create a “demand-led” approach. If individuals require further information or advice they could then be re-directed to a telephone helpline or could book a face to face interview with an adviser.
- 5. The LSC should consider including more information on the skills account website for older employed adults. This might include information about re-training, continuing professional development and discrete staff development units that could contribute towards a qualification.
- 6. The LSC may wish to consider developing more tools that can be used by individuals on an on-going basis rather than just at specific times when an individual is looking to start a career or take a new qualification. This might include tools relevant to current learners (e.g. study skills assessment) or employees (e.g. career development). This would help to create more frequent users of skills accounts.
- 7. The LSC should review the effectiveness of the batch upload system. The chart in Appendix 1 (page 65) illustrates that a large number of Strategic Learning Provider skills account registrations, from the start of the academic year, were not recorded in the skills account database until December. These individuals would not receive a welcome letter until January 2010, and would only be able to activate their account after this date.



Appendix 1: Technical Summary of Research Methodology

Key Quantitative Research Elements

- **Description:** The telephone surveys took place in November/December 2009 and January 2010. They were carried out using a script based CATI system. Interviews lasted approximately 5 to 15 minutes depending on the sample group. The questions were agreed with the LSC and were pre-tested prior to the interviews. The questions explored respondents' experiences and perceptions of skills accounts and the skills accounts website. The interviews also explored respondents' attitudes towards learning and their views on any current learning or learning they were planning start in the near future.

- **Target Population:** The research was aimed at three distinct target populations and the questionnaires were tailored for each group. These three groups were as follows:
 - Ø *Main Survey Group* - was made up of people who had signed up for skills accounts during the 2009/10 academic year.

 - Ø *Follow-up Survey Group* - had signed up for skills accounts during 2008/09 and had taken part in the initial surveys carried out in June and September 2009.

 - Ø *Control Survey Group* – was further subdivided into two populations. The first control group (November/December survey) targeted individuals who had a skills account which but had not activated their account. The second control group (January survey) were individuals on the Employability Skills Programme who had not opened a skills account. The control group data is not specifically used in the report but forms part of the data collection for subsequent analysis e.g. long term destination and success of skills account holders



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- The research was intended to produce an accurate reflection of the views of respondents who had recently signed up for a skills account along with the views of a comparative group of respondents who did not have skills accounts.
- **Sampling:** For the Main Survey group, a total of 1200 respondents were interviewed from an initial sampling frame of 4,160 whom opened a skills account between September 2009 and January 2010 (which was also activated) and had a telephone number. For the Follow-up Survey group a total of 400 learners were interviewed from a sampling of 892 respondents who had taken part in the June/September surveys and had agreed to be contacted again. For the first Control Group survey, 376 respondents were interviewed from a sampling frame of 2,084 and for the second Control Group survey, 108 respondents were interviewed from a sampling frame of 13,927. The table on the following page highlight further breakdowns.
- **Sampling Results:** For each of the surveys the target sampling numbers were achieved from the sampling frame datasets.
- **Sampling Effectiveness:** For the Main Survey group only 18% of account holders gave telephone numbers, although this figure rose to 22% for the January survey. Therefore, there would be some inevitable skewing of the sampling frame compared to the overall population of skills account holders. In order to compensate for skew in the sampling frame, minimum quotas were set for respondents age and gender to ensure the achieved sample was broadly representative. No corrective weighting have been applied to account for skew but the analysis in this report includes breakdowns by age, gender, current work status, home LSC Region and other characteristics in addition to the overall results where this is appropriate.
- **Data Entry and Verification:** Response data was collected by PH Research using a computer aided telephone interview CATI system designed in SNAP survey software system. Response data was subject to 100% verification and validation checking by RCU. Responses to open questions were reported in full unless otherwise stated and analysis.
- **Weighting of Survey Results:** All figures in the report are based on unweighted results. Where potential distortion could arise from differential response rates by key



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sub-samples, the results are reported within the sub-samples rather than being aggregated.

- **Estimates:** All quoted figures are actual survey responses and no use of estimated or imputed data has been made.
- **Bases and Data Sources:** The base figures and data sources for each table and chart are separately identified within the report text. In keeping with public sector data protocols, cell values have been suppressed if they occur at a level of 5 or below.



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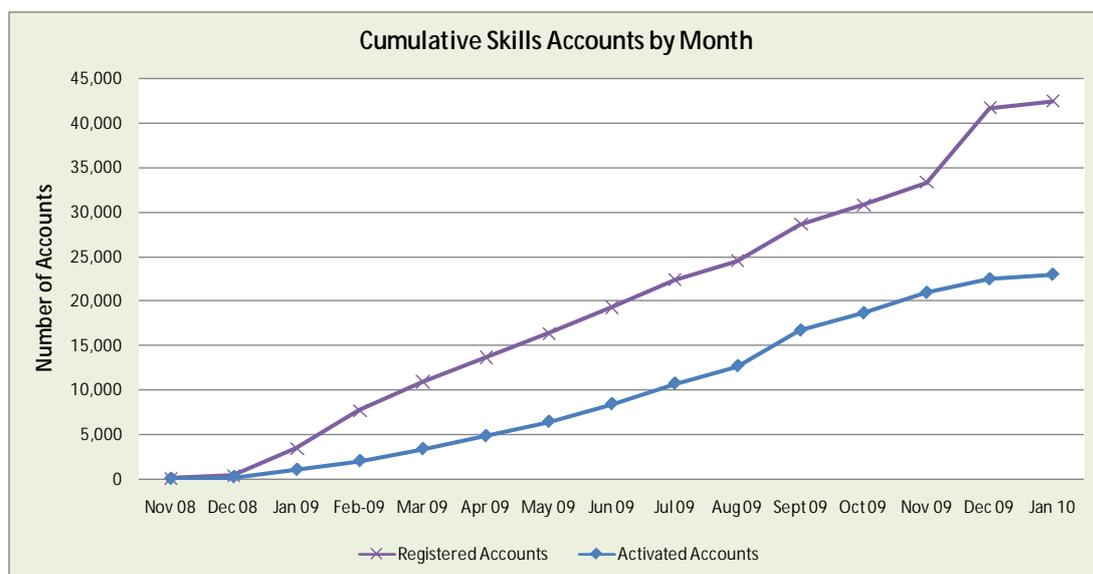
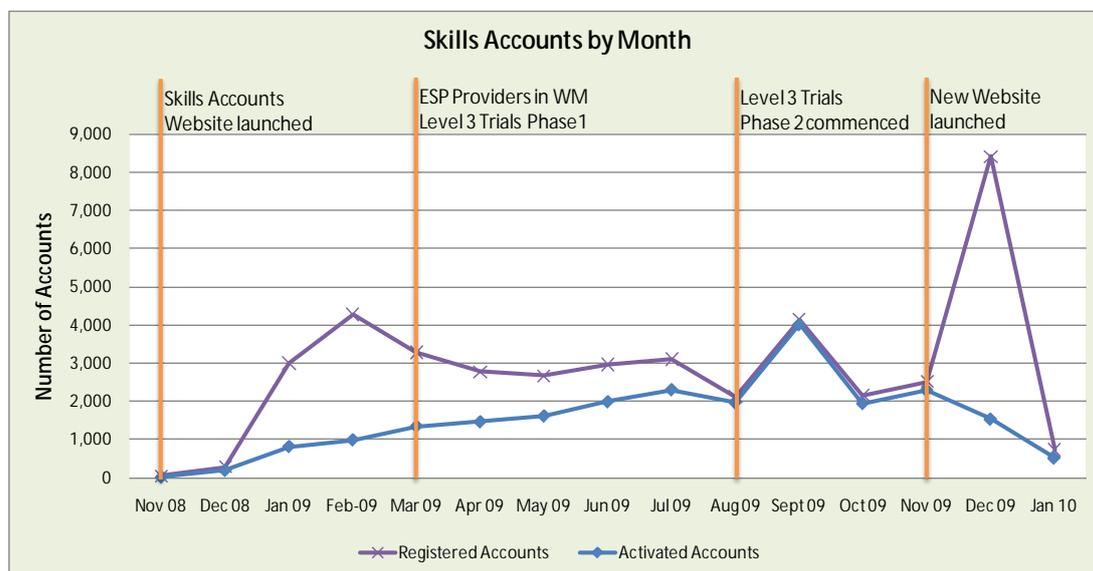
Gender	Total Skills Account		Main Survey Sample		Main Survey		Follow Up Survey		Follow Up Survey		Control Survey Sample		Control Sample 1	
	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%
Female	22,739	53.5%	2,320	55.8%	599	49.9%	462	51.8%	198	49.5%	1,287	61.8%	254	67.6%
Male	19,737	46.5%	1,840	44.2%	601	50.1%	430	48.2%	202	50.5%	797	38.2%	122	32.4%
Total	42,476	100.0%	4,160	100.0%	1,200	100.0%	892	100.0%	400	100.0%	2,084	100.0%	376	100.0%
Learner Home Region														
Total Skills Account														
	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%
East of England	1,198	2.8%	92	2.2%	9	0.8%	15	1.7%	6	1.5%	62	3.0%	14	3.7%
East Midlands	18,443	43.4%	1,387	33.3%	532	44.3%	331	37.1%	134	33.5%	790	37.9%	139	37.0%
Greater London	1,062	2.5%	100	2.4%	14	1.2%	12	1.3%	7	1.8%	48	2.3%	3	0.8%
North East	108	0.3%	26	0.6%	11	0.9%	1	0.1%	0	0.0%	0	0.0%	0	0.0%
North West	449	1.1%	168	4.0%	34	2.8%	5	0.6%	1	0.3%	1	0.0%	1	0.3%
South East	15,273	36.0%	1,679	40.4%	368	30.7%	391	43.8%	184	46.0%	1,074	51.5%	188	50.0%
South West	499	1.2%	155	3.7%	42	3.5%	1	0.1%	1	0.3%	13	0.6%	2	0.5%
West Midlands	4,826	11.4%	423	10.2%	162	13.5%	128	14.3%	62	15.5%	75	3.6%	26	6.9%
Yorkshire and Humber	551	1.3%	119	2.9%	25	2.1%	5	0.6%	4	1.0%	18	0.9%	3	0.8%
Channel Islands	2	0.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	1	0.0%	0	0.0%
Northern Ireland	10	0.0%	1	0.0%	0	0.0%	1	0.1%	0	0.0%	1	0.0%	0	0.0%
Scotland	22	0.1%	2	0.0%	3	0.3%	0	0.0%	0	0.0%	1	0.0%	0	0.0%
Wales	33	0.1%	7	0.2%	0	0.0%	2	0.2%	1	0.3%	1	0.0%	0	0.0%
Total	42,476	100.0%	4,160	100.0%	1,200	100.0%	892	100.0%	400	100.0%	2,084	100.0%	376	100.0%
Age band														
Total Skills Account														
	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%
18-24	10,427	24.5%	825	19.8%	337	28.1%	162	18.2%	51	12.8%	436	20.9%	51	13.6%
25-34	12,813	30.2%	1,192	28.7%	307	25.6%	219	24.6%	89	22.3%	595	28.6%	87	23.1%
35-44	9,998	23.5%	1,026	24.7%	252	21.0%	235	26.3%	100	25.0%	538	25.8%	110	29.3%
45-54	6,769	15.9%	771	18.5%	221	18.4%	180	20.2%	101	25.3%	365	17.5%	74	19.7%
55-64	2,292	5.4%	317	7.6%	82	6.8%	93	10.4%	57	14.3%	129	6.2%	46	12.2%
65+	166	0.4%	29	0.7%	1	0.1%	3	0.3%	2	0.5%	21	1.0%	8	2.1%
Unknown	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Total	42,476	100.0%	4,160	100.0%	1,200	100.0%	892	100.0%	400	100.0%	2,084	100.0%	376	100.0%



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Number of Skills Accounts Registered/Activated by Month



Registered Accounts are defined as all accounts that appear on the skills accounts database. This includes batch upload data from Strategic Learning Providers and the Careers Advice Service, showing individuals who have expressed an interest in having a skills account.

Activated Accounts are defined as all accounts that have a recorded username (Credential_ID), entered by the user when they first access their skills account. Following a batch upload individuals will need to access the website in order to activate their account.



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The large peak in Registered Accounts in December 2009 is due to a batch upload from Strategic Learning Providers.

Reporting

The report contains a combination of absolute figures and relative figures, such as percentages or variations from national averages or benchmarks. Tables and references contained in the report are labelled in such a way as to make their nature clear. Where subsets of the data or weightings have been used this is clearly identified.

The report includes a combination of direct reporting of survey outcomes and the interpretations/recommendations of **RCU** staff. The latter approach is clearly identifiable from the report context and/or section headings.



Appendix 2: Case Studies

1. Leicester College
2. VT Enterprise
3. PeopleServe Birmingham



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Leicester College

Introduction

Since the start of the trial in 2008/09 more skills accounts have been registered and activated at Leicester College than at any other college in the country. This case study provides details of the Leicester College experience and outlines the steps that they took to integrate skills accounts into their adult offer.

Leicester College were keen to be involved in the skills account trials from the start. The college wanted to be at the forefront of an initiative that it forecast would be a major element of adult skills funding in the future and one that had a close alignment to its own mission.

Initial Implementation in 2008/09

Leicester College set up a skills account project team to manage the trial. The skills account project team was headed by Keith Whittaker, Vice Principal for Curriculum and Planning. Other original members included the Student Services manager, Customer Services manager, Information Centre and Funding manager, Systems Development manager and representatives from the Marketing Department. An early task was to establish a network for cascading information and training regarding skills accounts between the project team and staff in all areas of the college.

Early into the initiative all front line staff at each of the main campuses were briefed on skills accounts and were encouraged to log onto the skills account website. This allowed them to experience the registration process first hand and also to be aware of the range of tools available on the first version of the website.

At the start of the trial a number of concerns were raised by staff about the benefits of skills accounts. However, these concerns have since been substantially reduced as the content on the site has steadily improved.

The **nextstep** adviser, based at Leicester College, was the primary promotional route for skills accounts during the initial few months of the trial. During the client interview the **nextstep** adviser promoted the career planning tools available via the skills account website rather than dwelling on the purpose of the voucher (a facility which has since been withdrawn).



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In the first year of the skills account trial the college set a target of enrolling 200 students on the skills account system. It was felt necessary to have a minimum of 200 in order to have sufficient volume to make the trial period meaningful. The 200 students were chosen at random with the only common feature that they were all selected during the course of an interview with the **nextstep** adviser located at the college. The time required for the **nextstep** adviser to set up all of the 200 skills account enrolments was of a sufficient magnitude that the college made available some additional administrative support for the nextstep adviser.

In 2008/09 the additional workloads for the Leicester College Management Information team was minimal with no additional financial costs associated with handling the skills account information. Indeed there was disappointment that the skills account and MIAP systems were not more integrated.

Developments in 2009/10

As part of a particular trial focusing primarily on the provision of learner support for Level 3 learners through the skills accounts service, the college set a target that by the end of the 2009/10 academic year all students aged 19+ on a Level 3 course will have registered for a skills account. As part of the Level 3 trial, the college had a dedicated member of staff to:

- Provide learners and staff with further information about skills accounts
- Assist learners with the online registration process
- Follow up those 19+ Level 3 students who did not opt out of the skills account but have yet to register
- Raise the general awareness amongst all 19+ students of the range of facilities on the skills account website that could be helpful to those seeking employment or further study on the completion of their course

The college also instigated new enrolment systems and processes. The college student support and admissions teams jointly devised a system whereby all 19+ Level 3 students who applied to the college were sent a letter of acceptance which included a statement that they would be encouraged to open a skills account. This introduction to skills accounts was purposefully placed at the beginning of the learner's engagement with the college.

At the start of the 2009/10 academic year the college hosted an enrolment week, during which the 19+ Level 3 students arrived at the college with their letter of acceptance. Each



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learner was provided with a combined enrolment form and learning agreement document which gave them the opportunity to **opt out of having** a skills account. All learners had to complete both forms and hand these to the admissions department before they would be allowed to formally enrol at Leicester College. Following enrolment learners were directed to a specific room furnished with IT facilities that allowed them to directly register online for a skills account. The learners who went through this process were uploaded to the skills account database using the batch upload. This process substantially increased the number of activated accounts on the batch upload, compared to most other colleges.

To encourage as many 19+ learners as possible to register for a skills account the college also placed a highly visible link to the skills account website from its own college website home page:



The screenshot shows the Leicester College website home page. At the top left is the Leicester College logo. To the right is a search bar and radio buttons for 'Courses' and 'Website'. Below this is a navigation menu with links for Home, About Us, Students, Employers, Courses, Contact, and Moodle. The main content area features a 'Skills Accounts' section with the heading 'Take control of your learning and working life today'. The text describes the benefits of Skills Accounts for learners aged 19 or over, including funding and financial assistance. It also mentions that Leicester College is trialing the launch in the East Midlands region. A link is provided to visit direct.gov.uk/skillsaccounts or call 0116 224 2240. A 'Download Skills Accounts PDF booklet' link is also present. To the right of the text is a video player showing a clip titled 'Benefits Apprenticeship Week' with a play button overlay. Below the video are three promotional boxes: 'Apprenticeship Week at Leicester College View all our videos', 'Guide to University Level Courses 2010', and 'Apprenticeship Guide'. At the bottom right is a purple box with the 'SKILLS ACCOUNTS' logo and the text 'Sign up for a Skills Account today'.



Key Lessons Learned

The Leicester College experience provides valuable pointers for other institutions looking to integrate skills accounts into their adult provision. The most important lessons learnt from the trial are listed below.

- The initial decision at the start of the trial to create a project team specifically set up to manage the whole skills account initiative was critically important.
- Having a member of the senior management team leading the project team was vital in order to demonstrate the full college support for the initiative and in cascading information through all areas of college.
- Ensuring the project team included members of staff from all college departments that have a role to play in the skills account process is important. These may include admissions, student services, learner support, management information, finance and marketing.
- Holding briefing sessions for support and teaching staff to explain the purpose of skills accounts and to demonstrate the content and facilities is necessary to raise awareness throughout the college and for staff to see at first hand the potential benefits for students.
- Incorporating skills accounts into the application and enrolment process is useful in helping to raise awareness of skills accounts with potential learners right from their initial engagement with the College. Having skills accounts included in every part of the process helps to give learners the impression that skills accounts are a core aspect of the learner support and information and guidance services.
- Having a dedicated member of support staff through the Level 3 trial with the specific task of promoting skills accounts and helping people to register was considered important.
- Continually improving and updating the skills account website is important if Colleges and Providers are to be successful in encouraging all adult learners to register for a skills account, because the accuracy and relevance of the information contained on



the website will be highly useful to their career opportunities and further learning choices.

- Now that the content on the skills account website has been significantly improved it could be incorporated into some of the adult programmes, particularly those aimed at improving skills for life and employability skills. In doing so learners would become familiar with the website and may access the site outside of college.

VT Enterprise: nextstep Prime Contractor in the South East

Introduction

This case study describes how the South East **nextstep** prime contractor, VT Enterprise, helped ensure that skills accounts were embedded into their overall information, advice and guidance service. Over 2,000 skills accounts were opened by clients accessing the South East **nextstep** service up to October 2009 and feedback from clients has been very positive. However, progress was rather slow at the start of the trial and the case study outlines the steps that were taken to raise the profile of skills accounts. The case study concludes with reflections from a number of **nextstep** clients who have opened skills accounts during the past year.

VT Enterprise is one of the UK's leading providers of careers information, advice and guidance services, supporting over 67,000 adults annually. VT Enterprise, as the prime contractor for the **nextstep** service in the South East, manages a team of VT advisers and 83 subcontractors, based in a large number of centres across the region. Subcontractors are made up of a mix of specialist careers companies, disability specialists, voluntary and community organisations, local Learndirect centres, colleges and other training providers and workforce development teams. The area covered by the **nextstep** service is diverse with both rural and urban populations. For the most part the area has low unemployment but there are pockets of severe economic and social deprivation.

Jan Page, Regional Service Development Manager, joined VT Enterprise in February 2009 and part of her responsibilities was to coordinate the roll out of skills accounts. When she joined, however, she found that progress with the skills account trial was slow and she quickly had to come up with a plan to move the initiative forward. Indeed, some advisers were less than enthusiastic about skills accounts. She told us:



“When I joined VT in February I didn’t expect such negative attitudes from staff. This was partly as a result of the late launch of the website but also because staff couldn’t see the practical benefits of skills accounts”.

Promoting Skills Accounts: A Plan of Action

In February 2009 skills accounts were in an early stage of development and a number of known issues with the website still had to be addressed. For example, passwords for the skills account website were difficult to generate and they could not be reset at a later date. The Skills Voucher feature had also caused a great deal of confusion amongst both advisers and clients. However, informal feedback from clients suggested that the concept of skills accounts was broadly welcomed. In fact, many clients were enthusiastic about having a ‘single portal’ on the Internet for accessing and storing information about careers and skills.

Jan Page soon realised that her main challenge was going to be selling these positive benefits to advisers and ensuring that short term technical issues with the website did not hinder progress. Jan Page, together with the management team at **nextstep**, put in place a number of actions to promote skills accounts. Whilst some of these actions may have been specific to the context in which VT Enterprise operated, many of them should also be of interest to any organisation wishing to utilise skills accounts.

Eight specific actions implemented by Jan Page’s team are listed below.

1. Presentations to Advisers and Stakeholders

Jan took a deliberate decision to speak to as many advisers as possible, selling the benefits of skills accounts and addressing head-on advisers fears and concerns. In total there were 10 formal presentations to groups of VT advisers and subcontractors, as well as presentations to groups coordinating the IES and Advancement Network Prototype projects. Jan told us:

“Personal presentations made a real difference. We stressed the benefits of skills accounts to the client and talked about the range of information in one place that would help clients make decisions about their learning and careers. Letting them know it was a trial was really important. We played down the role of Skills Voucher and acknowledged that the website was still developing.”



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Presentations and discussions about skills accounts also took place at other key events (for example, the VT annual conference in June and the subcontractor conference in November). Through these events skills accounts were given a high profile across the service and were promoted as strategically important for the organisation.

2. Regular Communication with Advisers

Monthly briefing summaries and email updates were seen as essential tools that helped maintain the momentum from the initial face to face presentations. Early briefings tended to focus on the mechanics of the skills account website (e.g. how to open an account and how to use the tools) but as time went on monthly briefings were much more about using skills accounts within the overall guidance offer (including quotes from clients). Skills account information was also regularly posted on *nextsteplive* (VT Enterprise's online information portal) and other in-house bulletins and newsletters.

The April 2009 briefing summary, for example, provides advisers with the following sample text for introducing skills accounts to clients:

"Let me tell you how a skills account could help you with your job search and course search.

The skills account is a website that will show you how your skills and interests can give you ideas for jobs. You can then click on the Job Profiles link to find what the job you've selected would be like, what qualifications and experiences you need and what salary to expect.

If you need some training then the Course Finder section will try and find you some colleges running a course for you. You may get some help to pay for part of your course.

You open a skills account by going to the website shown on this leaflet. Just enter your contact details and create your login. This then becomes your private place where you can keep your record of learning and skills.

Shall we open an account now?"

- Extract from April 2009 Skills Account Briefing Summary



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3. Targets for VT Advisers and Subcontractors

Early on in the trial, VT advisers and subcontractors were given targets for the number of skills accounts to be opened on behalf of clients each month. This not only helped focus the minds of advisers, but also meant that the impact of any support measures for advisers could be evaluated.

The value of these targets obviously depended on the accuracy with which the number of skills accounts opened could be measured and monitored. The management team could not get this information directly from the skills account website service so advisers manually report the opening of an account by ticking the 'skills account Opened' box on the client contact form. VT Enterprise used this information to publish a list of the number of skills accounts opened by centre and circulated this to all advisers on a monthly basis, so that everyone could see what everyone else had achieved.

4. Individual and Team Incentives

Jan Page introduced individual and team incentives (in the form of gift vouchers), in order to encourage advisers to open more skills accounts. Incentives included, for example, a £100 team treat for the centre that opened the greatest number of skills accounts. Monthly prize winners were announced in the skills account briefing summary, ensuring that successful practice was widely shared. Interestingly, Jan Page found that individual incentives tended to be more successful than team incentives.

5. Local Champions

'Champions' were appointed in each area, acting as standard bearers for the skills account trial and supporting the initiatives taken by the central management team. 'Champions' had the specific task of promoting the strengths of the online service to local advisers and generating feedback from individual clients.

6. Focus Groups with Clients

Whilst informal evidence suggested that clients welcomed skills accounts, it was also important to have more systematic and formal evidence that could be fed back to advisers. Local champions provided an important avenue for generating client feedback. In addition, focus groups with clients were set up and issues relating to skills accounts were discussed. In



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general, the focus groups showed that clients liked skills accounts. They were positive about having so much information in one place and valued being alerted to other options, like the possibility of training and external funding. In particular they were positive about being able to take personal ownership of their learning and skills.

7. Client Case Studies

Client case studies were a particularly powerful way of selling the benefits of skills accounts to advisers. Local Champions helped develop a total of five case studies and these were circulated widely across the service. The case studies have also appeared in Your IES News. The case studies (reproduced at the end of this document) include:

- A college student wanting to become a social worker
- A single mother who was encouraged to think laterally, resulting in a hairdressing course
- A redundant woman who was new to training
- A student who need funding for a diploma course and has now embarked on a degree
- Someone who needed clarification about their options and was delighted to find all resources in one place

8. Customised Promotion of Skills Accounts

Group sessions are becoming an increasingly important way to reach out to many clients (or client representatives) at the same time e.g. presentations to Primary Care Trusts. These sessions provide a valuable opportunity to promote the skills account service. Jan Page pointed out, however, that slides and handouts for different groups of clients need to be customised according to individual client needs. Jan told us:

“We have now developed customised skills accounts presentations for a number of different audiences, putting skills accounts within the context of their own experiences. It would not be anywhere near as effective if standardised materials were used for all clients.”



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Conclusions

As a result of the actions taken by Jan Page and her team, **nextstep** advisers in the South East have warmed to the concept of skills accounts and have embraced them as an integral part of the service. These advisers see skills accounts as a valuable facility, particularly within the Universal Plus and Differentiated and Personalised Service sessions. Some advisers, for example, are asking clients to use specific skills account tools between sessions so that face to face meetings can progress more quickly and can be more effective.

The VT Enterprise experience has demonstrated the positive impact of strong and enthusiastic leadership. A focus on effective communication with advisers, highlighting the benefits of skills accounts to clients, has helped to dispel any initial fears and has ensured that skills accounts are now an integral part of the careers information, advice and guidance service offered to clients.

Client Case Studies Developed by VT Enterprise

Client Case Study – Jamie

Jamie, a 29 year old client, dropped into his local college Student Information Centre on Monday 18 August saying he had been made redundant the Friday before.

He wanted to retrain and was considering social work but was very concerned about funding and supporting his family.

Luckily a **nextstep** adviser was able to see him immediately and as part of the guidance session he opened a skills account.

He was very excited by the skills account and said it was 'excellent'. He was particularly pleased to be able to access information about being a social worker, including skills needed and wages. He said he was going to access his skills account at home to explore his other options saying he had not been aware of the range of choices.

Jamie said that having the Account gave him back some control over his future as he could see his options and make his own decisions.



Client Case Study – Alice

Alice is a single mother who came for a guidance interview for help to kick start her future. Alice was unaware that courses had started 5 weeks before and that she was a little late to apply for this year. In addition, she thought her qualifications, 6 GCSE at grades D to F, were not good enough to get started. Moreover, Alice was worried about paying for any further education and the impact this could have on her benefit entitlement. Alice was very interested in becoming a social worker or teaching assistant.

During the guidance interview Alice opened a skills account and explored some of the job descriptions with the adviser. Slowly and tentatively it emerged that Alice's career choices needed more thought. A further guidance session was booked allowing time for reflection.

Alice attended a second guidance session and walked in with a beaming smile saying she was sure the results of her reflection were going to be a shock.

She then disclosed that she had always wanted to be a hairdresser and that she had realised that her creative nature needed fulfilment and that a career in hairdressing would open up her opportunities as she could move to America to be near her father and that her job skills would be just as useful there. Furthermore, Alice realised that she could not cope with the stress of the type of job she had originally been thinking of.

After a successful discussion about funding Alice was put in touch with the head of hairdressing courses at the College. Alice is currently waiting to see if she is able to join a course this year but if that is not possible she is already planning to enrol next year.

Client Case Study – Julie

Julie is 51 years old, has spent all her adult life working and 25 years of that in retail. She was made redundant in 2008 from a company she had worked with for 15 years. She tried one job which she did not like and then took another which did not work out either.

Her initial enquiry was CV advice and help with finding a job as soon as possible as her financial situation, if it became worse, could result in her losing the family home.

Julie discussed her experience and qualifications with her **nextstep** adviser. She was excited about the idea of learning a new skill and wondered if learning accountancy was an option.



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She couldn't wait to get started as she had never thought about training of any kind due to family commitments and working all the time.

This prompted the skills account option so she opened an account and quickly explored the 'course finder'. There was a 'springboard' option with Pitman Training and Julie was going to call in to see them.

With her leaflet and log in details, Julie was going to explore the skills account website in more detail, to see what was available. A VT member of staff said:

*"When I first met Julie she was down about her current situation. When she left 45 minutes later, she was a different person. Not only had she never thought of retraining or knew that there were courses and funding out there but she was excited, eager and keen to get started and explore in more detail the options she had discussed with her **nextstep** adviser."*

A productive and positive interaction.

Client Case Study – Sarah

Sarah, 42, has gone from styling hair to sculpting giant humans thanks to the financial support her skills account unlocked for her.

Having left school, Sarah's career began with an Apprenticeship in Hairdressing. Having two children was followed by time spent caring for her mother before taking a year to reassess her life.

Sarah decided to study for a National Diploma in Art and Design course at East Surrey College, with the aim of becoming a Graphic Designer. She has had to juggle family commitments, part time work and her studies.

An adviser from Student Services suggested that she opened a skills account to check what support might be available. Sarah was able to find out that she was eligible for help to meet some of the costs.

"I'd never heard of a skills account but, my goodness, it made all the difference in the world. I couldn't have completed the course without it".



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Having finished her course, Sarah has now started a degree where she is specialising in character creation and technical effects for film and TV. She is hoping to use her new-found skill as a sculptor for future work.

Client Case Study – Lianne

Lianne attended a **nextstep** interview as she wanted some careers advice. It very quickly became apparent that she would benefit from using tools such as a skills account and Labour Market Information to put a bit of science into what was for her a very confusing and vague situation.

After getting over the initial hurdle of user name and password Lianne explored the skills account website and was hugely excited. She declared the resource “brilliant”. When gently pushed for the reason why she found it so good Lianne replied:

“it tells you all the information you need. I googled this sort of thing before and did not get all this information and here it is, everything I need to know in one location”.

When asked if she would give consent for her experience and thoughts about the skills account to be used as a case study she immediately replied that she was happy to do so as she would like to help others learn about such a useful resource.

PeopleServe Birmingham

Introduction

The West Midlands was one of the first regions to pilot the Integrated Employment and Skills (IES) initiative. The aim of the IES trial is to build on the current welfare and skills systems so that all of those out of work get the integrated help they need to address their skills needs, find employment and progress in work through continued training.

A component of the IES initiative is the Employability Skills Programme which is an ESF co-funded programme aimed at adults aged 18+ and provides employability training for 20 hours per week for up to 15 weeks. The provision has been designed to offer unemployed adults the opportunity to achieve an employability qualification that develops all areas of returning to employment. The course offers the opportunity to work closely with an employment consultant



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to fully support them with job search and also have the opportunity for job tasters and work experience.

PeopleServe is an Employability Skills Programme training provider with operations in multiple regions of the UK. The company delivers a diverse range of services including educational and vocational training, job placement assistance, redundancy support and employment programmes and is delivering the Employability Skills Programme (ESP) from its numerous offices in the West Midlands.

Building Skills Accounts into the Employability Skills Programme

PeopleServe introduce skills accounts to the ESP participants during the induction stage of the programme. At this early stage the tutor provides a brief outline of what skills accounts are and the information contained on the site. This forms part of the wider induction where participants are introduced to a whole range of employability support systems and services.

By the second week of the programme PeopleServe Birmingham usually introduce skills accounts more formally. The reason for including skills accounts at an early stage of the programme is because the skills account website is frequently used throughout the programme. The content on the skills account website is directly relevant to several units of the employability award that participants work towards achieving during the 15 week course. Participants are invited to open an account as part of a joint group exercise. To help people through the process the tutor demonstrates the skills account website via a large projector screen. The qualification levels of participants on the course range from Entry Level through to Level 2 and the IT and numeracy skills of participants also varies significantly. Some people are capable of opening a skills account unassisted whereas others require additional one-to-one support with the IT and/or in reading the joining instructions and content on the website.

The initial groups of learners on the ESP programme had difficulties in remembering their individual login details and to overcome this issue several participants registered a new skills account. To stop this from occurring the ESP tutor recorded the login details for all participants and this was stored in a sealed envelope and stored within the participants' file in a secure location. When participants wanted to log onto their skills account but could not remember their login details, these could be retrieved via their tutor. Similarly, to open a skills account an individual needs to have a personal email address which many ESP participants did not have.



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Therefore an additional process for PeopleServe was to set up an email addresses for those who did not currently have one. The individual's email address was stored along with the skills account login details in the secure filing system.

Very few individuals have refused to open a skills account, largely because they are introduced to it in a very positive way by the tutor. However, those who have refused are adamant they will never use the website outside of the 12 week programme and therefore see no reason in opening an account. The response from participants who have opened a skills account is largely dependent on their individual IT capabilities. Questions have included:

- Will having a skills account cost anything?
- Can they access their skills account at home?
- Can they use their skills account once the course is finished?
- How much money is available through the voucher?

The initial information regarding the voucher was the cause of lots of confusion for the learners and the decision to reposition the concept as an entitlement should help to overcome this situation.

The reaction of staff to incorporating skills accounts into the ESP was initially one of concern in how the additional requirements could be accommodated into an already intensive 15 week programme. To aid the smooth introduction of skills accounts into the programme the PeopleServe manager produced a guide for tutors that included screen shots and assistance in registering participants. This was backed up by support for tutors in understanding the facilities contained on the website that could assist the tutors in delivering the employability programme. Within a short period of time tutors had become comfortable with skills accounts and could actually see the real benefits of integrating the facilities and services contained on the website into the delivery of some units of the employability award. A major advantage of using the skills account website content was that all the information was contained in a single place.

During the 15 week ESP programme participants and their tutor review progress at weeks 3, 6, 9 and 12. At each of those reviews the participants use of and opinions about the skills account website are discussed. These comments are recorded and help to form the support given to each of the participants. The specific aspects of the skills account website that tutors and participants considered to be particularly useful included the following:



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- The CV development tools and interview technique information works well in group learning sessions.
- The job profiles widen and raise the career aspirations of participants.
- The skills account website tools can provide the evidence base to support the participants' progress towards achieving the employability award.

As the skills account website evolves and more content is added, PeopleServe are confident it will become an important tool they can use in a wider range of employment and skills courses. Similarly, the website has information and services that are relevant to a wide range of people seeking careers guidance and support and should not be regarded as a tool to assist people with little or few qualifications.

