



WEA 'POUND PLUS' SUMMARY REPORT

September 2013

Contents

1. Introduction	1
2. Fee Income and Other Grant Income	2-3
3. Partnership Activity	4-6
4. Volunteering	7-10
5. Conclusions	11

Aims of the Report

This report seeks to quantify the additional income and savings that the Workers' Educational Association (WEA) generates in an academic year over and above the direct funding from the Government via the Adult Skills and Community Learning Budgets. This term 'Pound Plus' is used to describe this additional income and savings.

The research for the report was conducted jointly by the WEA and RCU Ltd. in February and March 2013 and involved data analysis, face-to-face interviews with community partners, and online and telephone surveys of volunteers. The Department for Business, Innovation and Skills helped fund this research in order to provide further examples of Pound Plus for the Community Learning sector.

Detailed Pound Plus reports on WEA Partnerships and Volunteers are also available upon request. Please contact Iram Naz on inaz@wea.org.uk for further information.

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1 Introduction

1.2 Overview of the WEA

The WEA is one of the UK's larger charities, and operates at local, regional, and national levels. The WEA has nine regions and over 400 local branches in England. Through these local and regional centres, during 2011/12 the WEA organised around 10,000 courses, enrolling nearly 120,000 adult learners of all ages and from all walks of life. It now has around 67,000 individual members.

Courses are created and delivered in response to local need, often in partnership with local community groups and organisations. The key objectives of the WEA are:

- raising educational aspirations;
- bringing great teaching and learning to local communities;
- ensuring there is always an opportunity for adults to return to learning;
- developing educational opportunities for the most disadvantaged;
- involving students and supporters as members to build an education movement for social purpose, and
- inspiring students, teachers and members to become active citizens.

1.3 Introduction to Pound Plus

Generating additional income and revenue is central to the objective of driving up participation in community learning within a very constrained public funding environment. 'Pound plus' is a new term that describes how learning providers can show how they are maximising the value of public investment. Pound plus refers to additional income (and savings) generated by providers over and above core income from Government's Community learning funding. This includes income generated through course fees, financial sponsorship, access to accommodation made available at no or reduced cost, the use of volunteer workers, donations of equipment or consumable items, and access to other funding sources or grants.

'Pound plus' allows providers to show that the initial investment of public funding in community learning has a crucial and positive leverage value that can be expressed as a multiplying factor for the initial public funding investment. In other words, it enables them to evidence that for every one pound of public funding investment a further 'x' pounds have been generated to extend reach, provision and impact – sums that might or would not be possible without the initial investment. Pound Plus approaches have been tested as part of the piloting of Community Learning Trusts. For further information please see the Community Learning Trust (CLT) pilot evaluation report for the set-up stage¹.

1.4 Introduction to the Research

In the initial phase of the research it was established that the vast majority of WEA pound plus income is derived from the following three sources:

- course fees and other grants;
- contributions in kind from community partners; and
- the use of volunteers.

This report investigates each of these areas in detail and attempts to estimate the level of pound plus that the WEA generated in 2012/13.

¹ <https://www.gov.uk/government/publications/community-learning-trust-pilot-evaluation-report-set-up-stage>

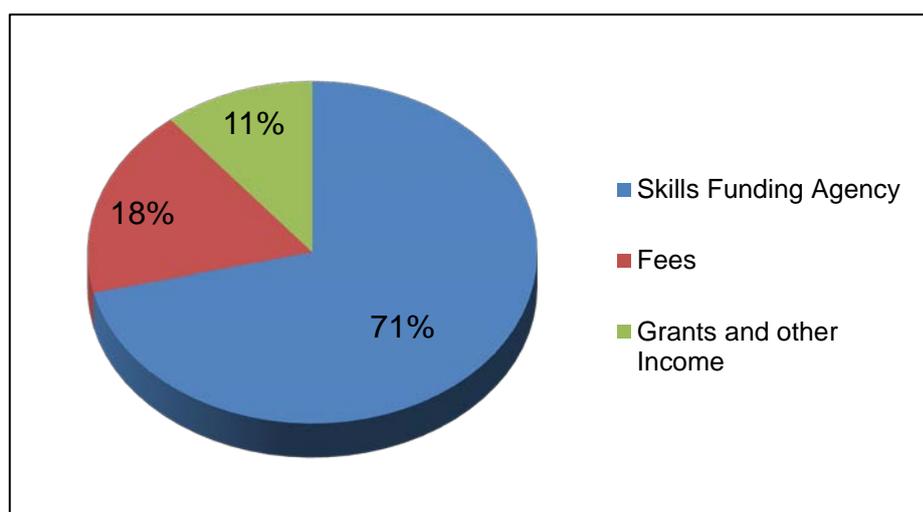
2 Fee Income and other Grant Income

2.1 Introduction

Information presented in this section has primarily been obtained from the WEA Trustees Annual Report and Financial Statements 2011/12. Any financial updates within the WEA were also included as part of this research project.

The financial accounts provide details on the level of Skills Funding Agency (SFA) allocation, income from course fees and details on other grants and tenders. The WEA has historically received about 70percent of its income from the Skills Funding Agency and 30percent from other sources. Figure 1 shows the WEA’s anticipated income breakdown in 2012/13. Figures 2 and 3 show how the LSC/SFA allocation, fee income and other grant income has changed over the past five years.

Figure 1: WEA Income Sources 2012/13



2.2 Skills Funding Agency Allocation

Skills Funding Agency income, as a percentage of total income, varied between 65percent and 71percent of the WEA’s total income over the past five years. The monetary value of the Skills Funding Agency allocation has been fairly static at just under £20 million, varying from £19.804 million in 2007/08 to £19.354 million in 2012/13. Although there are year-on-year variations, there has not been a significant change in the proportion of income coming directly from the Skills Funding Agency.

Skills Funding Agency income is directly related to the volume of learners enrolled, the courses they are undertaking and the support they receive. The WEA is classified by the Government as a Specialist Designated Institution (SDI) and its funding arrangements that differ from other learning and skills providers and community learning providers. The bulk of the WEA’s Skills Funding Agency income comes from the Adult Skills Budget with a smaller proportion coming from the Community Learning Budget.

2.3 Fee Income

Income from course fees is a significant source of pound plus for the WEA. The WEA offer both courses open to all adults which are advertised in the WEA brochures (public courses) and targeted provision designed to meet the specific needs of particular groups or communities (such as learners with a learning difficulty/disability, ex-offenders, deprived communities etc.). In general, public courses require payment of a course fee and targeted provision is free. The recommended fee rate for public courses, set by WEA trustees, is currently £3.00 per hour. However, WEA regions have the flexibility to charge more than this if they feel that is appropriate, depending on the types of courses and learners involved. Fees are remitted if learners are in receipt of a means tested benefit.

A differentiated fees policy involving a mix of fee bearing public courses and free targeted provision is fully consistent with the WEA's mission of ensuring that all adults have the opportunity to access learning including the most affluent and the most disadvantaged.

Fee income, including that paid by individuals and block fees paid by employers or groups, has remained fairly steady over the past five years. In 2007/08 fee income was £5.064 million and it is expected to be slightly lower in 2012/13 at £4.85 million. In general, there has been a reduction in block fees and an increase in fees paid by individuals.

2.4 Other Grant Income

Other Grants show the most variability over the period with a high of £4,351,000 in 2009/10 and a low of £1.85 million in 2008/09. The budgeted income of £2.95 million for 2012/13 represents an increase of just over £1 million from the draft 2011/12 outturn and includes a target for extra income generation of around £800,000 as identified in the Business Plan. Growing income from Other Grants has been and remains a strategic priority for the WEA.

Grants were obtained from a wide variety of sources including European Social Fund, Big Lottery Fund, Learning and Skills Improvement Service, and UK Online (amongst many others). Most of the projects established as a result of a grant are locally managed and designed to meet specific and targeted community needs.

2.5 Total Pound Plus Income from Fees and Grants

Course fees and grants are a significant source of pound plus for the WEA. Trend data shows that the proportion of total income coming from fees and grants has not changed significantly over the past five years. The WEA estimates that the total pound plus income from course fees and grants in 2012/13 is as follows:

Pound plus from fee income = £4.825 million

Pound plus from grants = £2.953 million

3. Partnership Activity

3.1 Introduction

The WEA is actively engaged in a large number of community partnerships across the country. These are seen as an essential part of WEA activity and are a key mechanism for delivering its mission of ensuring that learning opportunities are available to all learners irrespective of their background, income, ethnicity or disability. The community knowledge and expertise of partner organisations, combined with the educational experience of the WEA, provides a service that could not easily be delivered by one organisation alone. The working relationship between the WEA and partners is often very close with WEA staff being seen by partner organisations and learners as an integral part of the delivery and support team at a community venue.

Partnership activity is an important mechanism for generating pound plus. The overall level of resources available to community learning is enhanced because partners are contributing additional skills and resources over and above that provided by the WEA.

Quantifying the overall value of the pound plus 'contributions in kind' is difficult because every partnership is different, often varying significantly in scope and scale. Partnerships may be formed for the delivery of a single focused project or may be long standing and well established, delivering a wide range of different projects at one or more community venues.

However, in most cases, formal partnership agreements are established at the start of new partnerships. This list the responsibilities of both the WEA and partners and help to ensure the aims and objectives of joint projects are delivered. These provide a potential mechanism for quantifying contributions in kind.

In order to estimate the overall value of pound plus from partnership activity the research team looked at nine specific case studies. These describe specific examples of partnership activity in Yorkshire and the Humber and the North West and, where possible, attempt to quantify the level of pound plus generated. The case studies were developed by RCU in consultation with the WEA and involved a series of face-to-face interviews during February and March 2013. Each case study includes a brief description of the partners, the partnership activity the organisations were jointly engaged in, and an estimate of the pound plus contributions in kind. Details of the nine case studies are given in the report "WEA Pound Plus Partnerships (September 2013)"

3.11 Estimated Value of total Pound Plus from Partnerships across all WEA Regions

The nine case studies show that the community partnerships involving the WEA are extremely varied and wide ranging in scope. It would be difficult to accurately count the pound plus value of all partnership activity without creating a massive administrative burden for staff engaged in working with partners. However, it is possible to estimate an approximate figure for pound plus income by drawing some general conclusions from the case studies. This assumes the nine partnerships visited in Yorkshire & Humber and the North West are typical of partnership across the rest of the country.

The major sources of pound plus appear to be:

- accommodation, provided free of charge by community partners;
- support staff from community partners providing additional help in the classroom and in ensuring the availability of general administrative service - this was particularly important where learners had learning difficulties and/or disabilities;
- Recruitment and marketing. In most cases recruitment and marketing was done exclusively by community partners; and
- Availability of additional resources such as specially adapted equipment and refreshments.

In order to estimate the overall pound plus contribution we can estimate the approximate contribution from the above factors for each learner, learning activity or partnership. This is necessarily very approximate because of the wide variety of partnership activity that the WEA is involved with, but it should provide a useful starting point.

In addition to the four factors listed above, community partnerships are often highly successful in securing additional grant income. If the WEA was the lead partner in bidding this would already be included in the WEA's financial accounts as other grant income. Typical examples in the case studies were NIACE Community Learning Innovation Fund (CLIF) funding and grants from LSIS. If partner organisations are the key source of funding then this has not been included in the table on the next page. Examples in the case studies include lottery funding, and funding from Government departments and third sector organisations. Many community venues were directly funded by the Local Authority, for the core purpose of providing a service to a particular target group (such as adults with disabilities). The pound plus value of these income sources to community learning has not been quantified in this report. This is primarily because the community learning element of a funding source is only a part of the total purpose of the grant (e.g. £250,000 Archaeology project) and it would be very difficult to make a reasonable estimate of the contribution from these grants and extrapolate this to the whole of the country. The pound plus calculations on the next page are therefore likely to be a significant underestimate of the total pound plus value of community partnerships.

Figure 2: Partnership case studies summary

Partnership	Region	Total Contribution in Kind (Accommodation, Support Staff, Marketing and Recruitment and Additional Resources)	Enrolments supported through partnerships
Addison Day Care Centre	Y&H	£29,575	300
Stonham	Y&H	£4,055	41
Wellgate Court	Y&H	£1098	12
Copeland Occupational and Social Centre	NW	£35,865 + £50,000 external funding received	60
Barnardo's/ Action for Children	NW	£12,840	324
Copeland Aftercare	NW	£2,412	14
Foresight Centre	Y&H	£46,658	396
Osmond Thorpe Resource Centre for adults	Y&H	£27,580	108
Cultural Partnerships. Partnership projects which attract external funding i.e. Just the Ticket, Peripheral Vision and View	NW	External funding received from these partnerships in recent years: £195,000	
Total Pound Plus Total external funding through partnerships		£160,083 £245,000	Total enrolments 1255

The total 'in kind' contributions from the nine partnerships in the case studies from Yorkshire and Humber and North West regions equate to £160,083 which supports 1,255 enrolments in the year. Therefore each enrolment (engaged with partnerships) within the WEA receives approximately £127 (on average) of 'in kind' contributions from partnerships based on the case studies. This includes free accommodation, support workers, marketing and recruitment and any other additional resources.

According to WEA's Management Information System, in 2012/13 there were 115,257 total learner enrolments across the WEA. According to the data, 18.6 percent (21,519) of these WEA enrolments were supported by some sort of partnership activity. Therefore if we use the £127 average partnership value established from the nine case studies and multiply this by 18.6percent (21,519) of enrolments, the WEA is estimated to receive 'in kind' contributions starting from £2.7 million (£2,732,913). This is an underestimate as it is based on limited partnership and enrolment data that is currently available on the WEA's Management Information System.

As noted previously, this method for estimating the pound plus value of partners' 'in kind' contributions has significant limitations. However, the WEA's current partnership strategy is being developed to incorporate more robust data and information collection which will enable subsequent research and analysis to be more accurate.

4 Volunteering

4.1 Introduction

The WEA estimates it has 2,800 active volunteers who support its work by serving as Trustees, regional or local committee members or running branch activities or Local Associations. Volunteers are drawn primarily from the WEA's membership and play a crucial part in achieving the Association's objectives. Some volunteers use their professional expertise, whilst others give their time and energy in work that is not related to their everyday jobs. Many volunteers may be retired or not in paid employment.

Until now, the contribution of volunteers has not been quantified. The information on volunteering roles and the time spent volunteering has not previously been documented, so calculating its monetary value has not been possible. The pound plus project has provided an opportunity to investigate the value of volunteering both to the WEA and to the community in general.

4.2 Methodology

In February 2013, an online survey for WEA volunteers was set up using Survey Monkey. The questions focused on how many hours of work WEA volunteers were doing per month and what roles they had. The survey also included qualitative questions asking for detail on what each role entailed and the impact of volunteering on each individual and the community.

The survey was sent to 1,066 volunteers (volunteers with active email addresses) from the 1,643 volunteers who were on the WEA database at the time of the research. Volunteers were given a two week window to respond, with a reminder to help generate a better response rate.

4.3 Survey Response

There were 346 responses in total, which is a 32percent response rate. The profile of respondents in terms of age, gender and region was compared to volunteer roles in general within the WEA and respondents appeared to be broadly representative of the overall population. In common with the WEA's overall volunteer population, survey respondents were predominantly female (64percent), over 65 years of age (64percent) and White-British (89percent). The highest number of survey responses came from the Eastern Region (35percent) and the Southern Region (22percent). The vast majority of volunteers (74percent) are retired with only 3percent working full time

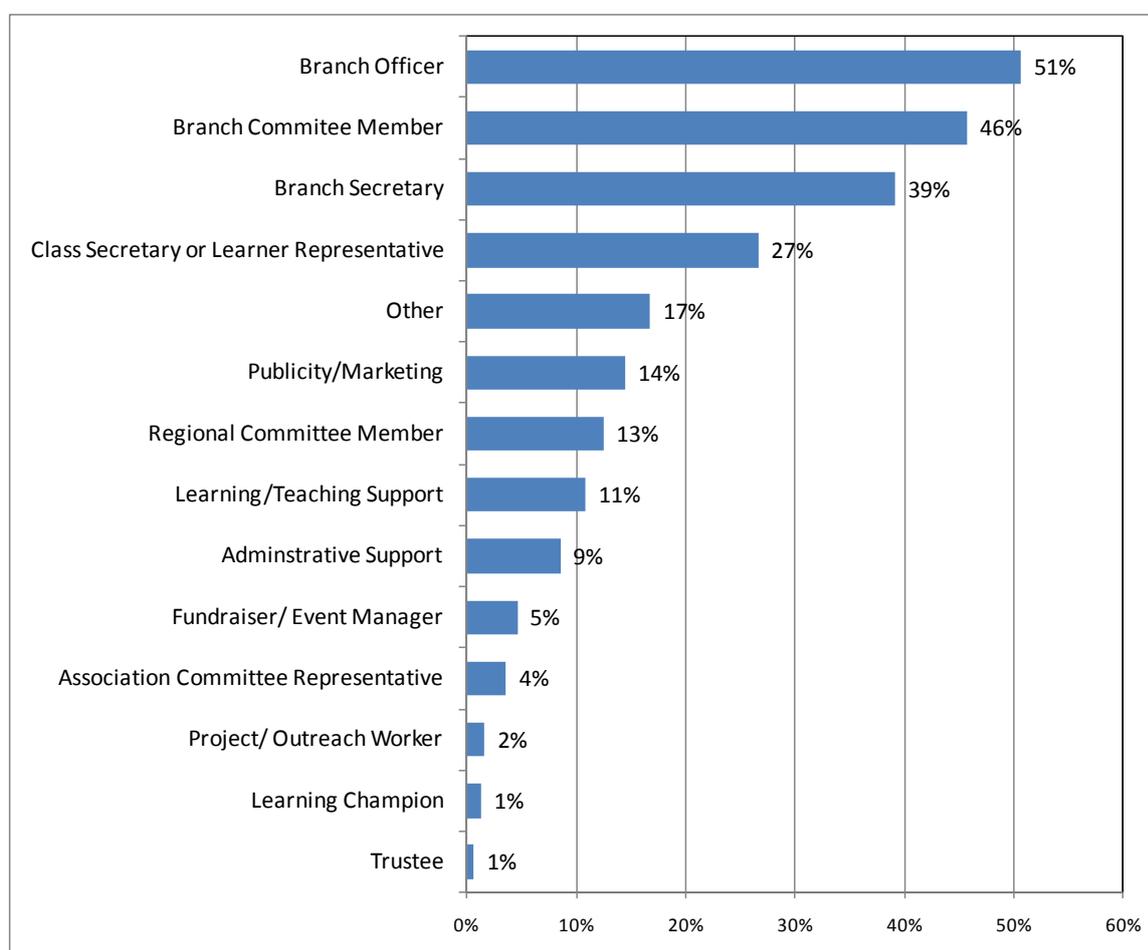
The survey was later followed up with nine detailed telephone interviews with volunteers who fell into the most common volunteering roles. The purpose of the calls was to check and amplify the survey responses and obtain additional information about volunteering activities

The research findings were used to build profiles of the various volunteer roles and the number of hours spent in these so that a monetary pound plus value could be attached to the activity.

4.4 Survey Findings

Figure 3 shows the roles that WEA volunteers said they were undertaking (respondents were able to select more than one role). The survey confirmed that most of the WEA volunteers (74percent of respondents) had multiple roles, and discussion with volunteers suggested that there is often significant overlap in the activities carried out between different roles. About half of the respondents acted as branch officers and/or branch committee members, providing essential organisation support for the WEA’s organisation and operation. A significant number of volunteers had specific functions related to learner recruitment or learning delivery such as publicity/marketing (14percent), learning/teaching support (11percent), project/outreach worker (2percent) and learning champion (1percent).

Figure 3: Volunteer Roles Undertaken by Respondents



The majority of volunteers were spending up to five hours per month on volunteer activities whilst a smaller number were volunteering for over 20 hours per month. The latter were typically engaged in committee duties or secretarial, administrative or office work. The research highlighted the wide range of hours spent by different individuals as well as the wide range of activities they were engaged in.

In terms of the frequency of volunteering over 57percent of respondents said that they were engaged in volunteering activities at least once a week, with 29percent volunteering twice a week and 14percent every day. Less than 5percent of respondents said that they volunteered once a term or less frequently.

4.5 Estimating the Pound Plus Value of Volunteers

Responses from the online survey allowed for the estimation of the total pound plus contribution from volunteers. The number of volunteer hours can be converted into a financial contribution by multiplying by an appropriate hourly rate.

Figure 4 below summarises the total number of volunteer hours per month and the roles the volunteers were undertaking. This is based on 304 survey responses.

Monthly volunteer hours from 304 volunteer survey sample = 4,683

Figure 4: Summary of Volunteer Hours

Volunteering Activity	Hours /month
Raising money or taking part in sponsored events	31
Leading a group	275
Being a member of a committee	1116
Organising or helping run an activity or event	639
Visiting people	28
Classroom support	502
Be-friending or mentoring	42.5
Giving advice or information	299.5
Secretarial, administrative or office work	998.5
Providing care and support	72
Governance activities (i.e. decision making)	292
Recruiting	115.5
Marketing/ Publicity	126
Partnership Development	13
Representing/ Campaigning	106.5
Conducting research	23.5
Transport	3
Total Number of volunteer hours per month	4683

WEA volunteers are actively engaged for approximately nine months in any academic year.

Estimated annual volunteer hours from the 304 volunteer sample (assume nine months) = 42,147

The WEA estimates that approximately 2,800 volunteers are engaged across the country (1,643 are currently on the WEA database and the remainder are yet to be added to the database). It is assumed that the survey sample is broadly representative of the population as a whole and can therefore be used to estimate the total volunteer hours nationally (multiplying sample hours by 2,800 and dividing by the sample size of 304).

Estimated number of volunteer hours for national population of 2,800 volunteers = 388,196

The monetary pound plus value is the direct cost saving to the WEA from using volunteers and is calculated by multiplying volunteer hours by £11.09. This is the Community Development Foundation's financial proxy for one hour's volunteering, based on the 2010 ONS Annual Survey of Hours and Earnings (ASHE) median gross hourly earnings rate. This figure is also used by the Government's Community First project (overseen by Cabinet Office/OCS) and it is the multiplier being used by the Community Learning Trust pilot projects.

Total Pound Plus Value from Volunteering (assuming £11.09 per hour) = £4.31 million

5 Conclusions

The research project has attempted to quantify the additional income and savings (pound plus) generated by the WEA over and above the core income from the Skills Funding Agency. This approach is known as pound plus. The financial contribution does not, of course, capture the wider benefits of WEA partnerships and volunteer work, although the case studies and examples within this report highlight the wide range of activities that branches and volunteers are engaged with.

The results from the pound plus analysis are summarised in the table below. Throughout the analysis we have stressed that pound plus values are an estimate and are likely to under-represent the full amount of pound plus that is actually being generated.

The diverse and evolving nature of partnerships which are responding flexibly to local community needs are inherently difficult to quantify and convert into a financial value. The approach taken in this report is to estimate the financial contribution from partners in four key areas which are fairly common across the vast majority of partnerships – the provision of free accommodation, marketing and promotion of courses, the provision of additional classroom support and the availability of physical resources. The estimate of pound plus for partnership activity does not include additional grant income, for example, that secured by partners.

The estimate of volunteer hours is derived from an online survey of over 300 volunteers. The survey highlighted the diverse range of activities that volunteers are involved with and the wide range of commitments, in terms of time, that they make. Discussions with WEA volunteers and managers, suggest that figures presented in the report may well be an under-estimate of the total commitment from volunteers.

Skills Funding Agency Grant	£19.35 million
Pound Plus Category	Estimated Value 2012/13
Fee Income	£4.85 million
Other Grant Income	£2.95 million
Partnership Pound Plus Income	£2.72 million (minimum)
Volunteer Pound Plus Income	£4.31 million
Total	£14.84 million
Pound Plus	£1 public funding = 77p Pound Plus