Project Overview and Summary of Findings and Conclusions

Introduction

This report provides the background to, methodology for, and overall findings, conclusions and recommendations of a review of the current demand and supply of Further Education (FE) provision in Scottish Further Education colleges. The review was commissioned by the Scottish Further Education Funding Council (SFEFC), and carried out between November 1999 and June 2000 by a team of researchers drawn from the Scottish Further Education Unit (SFEU), the Centre for Research in Lifelong Learning, Glasgow Caledonian University/University of Stirling, and the Applied Statistics Group, Napier University. The project was supported by a Steering Committee convened by SFEFC comprising representatives of the sector and the Council. Appendices 1 and 2 list the membership of the project team and the Steering Committee.

The research team is indebted to the many people in colleges and the wide range of agencies who co-operated with the review and provided detailed information and considered responses on supply and demand of FE in Scotland.

Review specification

The Council instigated the review to address the current demand and supply of FE provision in incorporated colleges and in Orkney College, Shetland College, Sabhal Mor Ostaig and in Newbattle Abbey College. The review is intended to assist the Council in its determination of the ‘adequacy’ of FE college provision in Scotland including helping to identify any gaps in or duplication of FE provision. The review maps FE college provision by individual colleges, by travel to study area, by region, and at national level. In addition the review attempts to measure the level of demand at college, regional and national level as well as the level of need as identified by relevant bodies. The review also assesses the role of private training providers in meeting supply and demand.

The full review specification is included as Appendix 3.

Outcomes and methodology

In addition to this Project Overview, the outcomes of the review are:

- Executive Summary
- Review of Policy and Research
- College Profiles of Supply and Demand
- Regional Profiles of Supply and Demand
- National Profile of Supply and Demand
- Travel to Study Areas
- Analysis of Labour Market Data
The project aimed to establish a foundation of information on supply and demand which could inform policy decisions at national, regional and local levels and which could lead to further research and developmental activity which may be appropriate to supply and demand in Scottish FE.

The review sought to gather information on the adequacy of FE college provision. For the purposes of the research we defined adequacy as the extent to which supply matches current and anticipated demands and needs. We teased out dimensions of adequacy by exploring the following areas:

- **Current provision**
  - The amount and range of supply in terms of programmes and qualifications.
  - The amount and range of supply of different modes of provision and the accessibility of provision.
  - The extent to which supply is meeting the needs of particular groups of students (different age groups, males and females, and socially excluded groups).
  - The extent to which colleges define and respond to local, regional and national markets.
  - The extent of the contribution of private training providers.

Data was gathered and analysed on student enrolments and SUMs; enrolments by level and type of qualification; age, gender and subject groupings; student clusters (see definition on page 3); mode of study by gender; fee type by gender; flexible and on-line learning; travel to study; commentary from users; private training provision.

- **Gaps and changes in provision**
  - Areas where there is overprovision, insufficient or no provision.
  - The extent to which provision is being developed to meet anticipated and emerging changes in local, regional and national markets.

Data was gathered and analysed on areas of current and anticipated increase in demand; areas of current and anticipated decrease in demand; gaps in current provision; and labour market information.

- **Collaboration**
  - The forms and extent of collaboration amongst providers.

The research also sought to gather information on other issues which impact on FE
colleges’ ability to meet demands and needs for education and training.

We gathered evidence – some qualitative, some quantitative – in order to reach conclusions on the adequacy of supply of FE provision at regional and national levels using the framework of dimensions identified above. More detail about the sources and methods employed follows.

The present supply of the 47 individual FE colleges, and recent changes in this, was profiled through analysis of FE statistical data (FES 1 and 2). Colleges also provided additional quantitative and qualitative data via a questionnaire on supply and demand issues. These sources of data were used to produce statistical and descriptive profiles at college, regional and national levels.

These profiles were supplemented by qualitative data related to a similar set of issues and gathered from key stakeholders and partners at regional and national levels. At regional level, senior people from Local Enterprise Companies (LECs), Employment Service District Offices, Careers Services and Adult Guidance Networks were asked to complete a questionnaire. To give greater depth to the regional analysis, stakeholders and providers in two contrasting regions – Glasgow and Grampian – provided further qualitative data. At national level, interviews were conducted with senior people from national agencies covering a wide spectrum of interests in FE.

To gain insight at regional and national levels into variations in patterns of travel to study, we looked at the travel patterns for students on five different types of provision: part time NC provision in Care, full time NC provision in Care; part time HNC/D provision in Mechatronics, full time HNC/D provision in Mechatronics; part time provision in Building.

Labour market data were also gathered and analysed at national and regional levels. The data comprised number and percentage of employees by industry, percentage of people in occupational classifications, percentage of working age in employment, participation in education and training, and claimant counts.

And finally, Scottish Qualifications Authority (SQA) and City and Guilds of London Institute, Scotland (CGLI) data on private training providers were analysed to allow us to assess the contribution to the supply of education and training from the private sector.

It should be noted that, with the exception of the study of private training providers, the research was focused exclusively on provision from FE colleges. Apart from private training organisations there are considerable areas of college provision which overlap with that of other providers for the same groups of students. These are: Higher National courses in colleges and sub degree courses in HEIs, National Qualifications in colleges and school provision for S5/S6 students, and community-orientated courses in colleges, community education services and voluntary sector services. A more complete analysis of the relationship between supply and
demand for Further Education would have to take account of the extent to which the supply from these other education and training providers in the overlap areas contributes to the adequacy of the totality of FE-type provision.

Prior to the process of data collection, a briefing seminar was organised for college Principals and senior managers. Its purposes were to outline the rationale for the review and discuss the contribution colleges would make to the research. The event was well attended and afforded the opportunity for a useful exchange of views between the research team and colleges.

Brief descriptions follow of each of the components of the review.

**Executive Summary**

A brief summary of the purpose, findings and conclusions of the review.

**Project Overview and Summary of Findings and Conclusions**

This provides the background to, methodology for and overall findings, conclusions and recommendations of the review.

**Review of Policy and Research**

The review documents the policy environment of FE in Scotland, reports on labour market issues in Scotland and the UK, reports on how colleges are developing and expanding provision, and summarises literature relating to supply and demand issues in education and training. The review provides a context and background for the study.

**College, Regional and National Profiles of Supply and Demand**

The college profiles of supply and demand were produced through analysis of FE statistical data (FES 1 and 2) held by the Scottish Executive and SFEFC and through analysis of information supplied by colleges in response to a questionnaire. The questionnaire was reviewed by a number of college senior managers and revised in the light of comments received before distribution. Each profile contains a section derived from the statistical data and a more descriptive section derived from the questionnaires.
The statistical section of the college profiles includes detailed data on: the location of the main centres of FE provision in the area; student enrolments; student characteristics by age, sex and subject; mode of study; fee type; and travel to study area. A clustering method has been used to classify the students from each college into five broad types. The descriptive section includes: detailed data on college structure; forms of provision; provision serving regional or national markets; collaboration with other colleges, Higher Education Institutions, schools and other organisations; changes in provision; gaps in provision; anticipated changes in provision.

The data on individual colleges were aggregated to contribute to regional profiles of supply and demand. In this context ‘regions’ correspond to LEC areas for Scottish Enterprise LECs and to the Highlands and Islands Enterprise (HIE) area. The data for all colleges with their main site(s) located within a regional boundary – both statistical and descriptive – were aggregated. In addition, regional profiles contain labour market data for the region and a report on regional agency perspectives on FE provision in the region. In-depth studies\(^1\) were carried out in Glasgow and Grampian regions.

The data on individual colleges were also aggregated to contribute to a national profile of supply and demand. The first part of this profile was generated from college data. This has a short statistical section and an extended descriptive section which includes a final part covering sectoral issues, including the structure of the FE sector, and relationships between the sector and other providers. In addition, the national profile contains national labour market data, a report on national agency perspectives,\(^2\) a report on Careers Service and Adult Guidance Network perspectives,\(^3\) and a report on Enterprise and Employment Agency perspectives.\(^4\)

**Travel to Study Areas**

A microanalysis of travel patterns for students on selected types of course was carried out. This allowed the mapping of individual lines between a student's home and the college where they are studying. Five different types of provision were analysed to gain insight into the variations in travel patterns. National patterns by area for all students were also considered. This allowed the definition of regions within our report and the definition of local areas for each college.

**Analysis of Labour Market Data**

The analysis of the labour market data provides information about the patterns of employment with respect to industry and occupational groupings for Scotland within each of our regions. Information is also provided on percentages who are employed, length of time unemployed, and levels of qualifications achieved. An analysis is provided in which national patterns, and regional variations are identified, and the implications for education and training are outlined. The data on which this is based has been drawn from the Annual Employment Survey, and the
Labour Force Survey, and has been accessed through the NOMIS database.

**Comparison of qualification data from the Scottish Executive FES database and the SQA database**

This paper provides background to the statistical analysis of FES data on Scottish Vocational Qualifications (SVQs).

**Analysis of SQA and City and Guilds Awards Data**

This background paper supplements the paper *Comparison of qualification data from the Scottish Executive FES database*.

**Clustering of Students**

This background paper explains the methodology used in the clustering of students described above.

**Definitions Used in Statistical Analysis**

This background paper explains how the data used in the statistical profiles were derived from the FES returns.
Findings, conclusions and recommendations

This section has two components:

- Presentation of findings.
- Conclusions, recommendations and issues for further research.

Presentation of findings

The review sought to illicit information on the adequacy of FE college provision. The dimensions of adequacy we used are set out on page 2. The research team developed a set of research questions related to the dimensions of adequacy. These were used in various methods of data collection and analysis. This section draws together and presents the data related to each research question. The table on the next page lists the research questions and shows the sources of evidence which we draw on in relation to these.
<table>
<thead>
<tr>
<th>Research questions</th>
<th>Sources of evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Colleges</td>
</tr>
<tr>
<td>What are the strategic priorities for FE provision?</td>
<td></td>
</tr>
<tr>
<td>What is the current supply of FE provision?</td>
<td>V</td>
</tr>
<tr>
<td>What is the distinctive contribution of the FE sector?</td>
<td>V</td>
</tr>
<tr>
<td>What is the distinctive contribution of private providers?</td>
<td>V</td>
</tr>
<tr>
<td>How effective are colleges in meeting the needs of different student groups?</td>
<td>V</td>
</tr>
<tr>
<td>How effective are colleges overall?</td>
<td>V</td>
</tr>
<tr>
<td>What are the areas of growth and decline; where are the gaps?</td>
<td>V</td>
</tr>
<tr>
<td>What other improvements are sought from colleges?</td>
<td>V</td>
</tr>
<tr>
<td>Are changes needed in the location and distribution of colleges?</td>
<td>V</td>
</tr>
<tr>
<td>What developments in relationships between FE colleges and other organisations are required?</td>
<td>V</td>
</tr>
<tr>
<td>What other issues affect FE colleges’ ability to meet demands and needs for education and training?</td>
<td>V</td>
</tr>
</tbody>
</table>
What are the strategic priorities for FE provision?

We asked this question of senior representatives of key agencies nationally and in Glasgow and Grampian regions (the case study areas) in order to better understand the context of their responses to the research questions. The Labour Market Study and the Review of Policy and Research were additional sources of information.

When asked about the strategic priorities for FE provision respondents from the national agencies identified meeting employer needs as a priority area. Meeting these needs included understanding and responding to market trends so as to develop people in emerging skills areas, re-skilling and up-skilling the labour force, preparing people for work, supporting the transition to work, and engaging more with SMEs. The other priority area was related to increasing participation, particularly for those who are socially excluded.

Respondents from Glasgow identified the need to increase and widen participation, improve and develop collaborative links and partnerships, take a higher profile in Training for Work and improving employability, and further improve access to education. Developing people in emerging skills areas and better matching the needs of employers were also mentioned.

Respondents from Grampian also identified the need to understand and respond to market trends so that students are equipped with appropriate skills, to use labour market information and intelligence and to understand the needs of employers. Widening access and increasing participation were further priority areas that were consistently identified. Finally partnerships and collaboration with other agencies were considered vital in ensuring the breadth and depth of provision required throughout the region.

There is a consensus at both national and regional level that the strategic priorities for FE relate to economic development, increased participation and widening access. Moreover, collaborative activities which take account of local and regional factors have an important role in meeting strategic priorities.

These priorities accurately reflect the policy framework outlined in government publications and discussed in the Review of Policy and Research. The general thrust of these documents is that Scotland is moving towards becoming a ‘Learning Society’. Within Opportunity Scotland and other policy papers Lifelong Learning is strongly associated with the need to upgrade and re-skill people to meet the needs of a changing economy in a post-industrial society. Opportunity Scotland also set a specific target for increasing the number of participants in FE and set out a 10 point plan for achieving this aim.

Skills for Scotland focused on those currently in employment and noted the importance of the FE sector in supplying this group with vocational education training which was responsive to changing labour market needs. Further Education
in Scotland (1999) reviewed the prevailing situation within the sector and identified two aims: wider participation and collaboration. FE was again placed firmly at the centre of the Lifelong Learning agenda. It is evident that the Government’s intention is to stimulate and support an increased demand for education and training, especially from those not currently involved, in order to improve the skills of the workforce generally and thereby improve economic prosperity.

The Government also has a policy agenda relating to social inclusion. These policy documents use different language and have different emphases to those mentioned above but the basic message is clear – FE colleges are seen as key institutions in widening access and promoting social inclusion and Lifelong Learning in the context of economic and societal changes.

What is the current supply of FE provision?

Data were gathered through analysis of FE statistics and information supplied by colleges. The data included main centre and outreach provision, enrolments, student characteristics, mode of study, fee types, flexible and on-line learning, provision serving regional or national markets and collaborative arrangements. Additional sources of information were the Private Providers study and the Travel to Study Areas report.

Distribution of main campuses and other sites

The distribution of colleges within the regions exhibits variation. All 12 lowland regions have at least one college and 10 have two or more within their boundaries. Within our Highlands and Islands region, 7 of the 11 LECs have a college situated within their boundaries.

Colleges identified the number of main campus sites currently being used, with such sites being defined as locations where staff are permanently based and students have access to some central resources, eg. library and/or computer facilities and a range of course provision. Almost one third of colleges (32%) use one main site and almost a quarter (23%) use two. Colleges that have only one or two main campus sites are spread throughout Scotland but include four of the five Lanarkshire colleges and six of the 10 colleges based in Glasgow. The seven colleges with five or more main campus sites include three city-based colleges and four that are based in more rural towns/areas. The percentage of students on main campus locations ranges from 65% -100%. Thirty eight percent of colleges have between 91% and 100% of their students enrolled on main campuses.

The FE sector’s response to Government educational priorities for widening access and social inclusion and the implications of the changing frameworks for work based qualifications are reflected in the wide range of locations for provision they operate in the communities and labour markets they serve. Ninety percent of colleges currently use locations in the community and 85% use private and public sector employers’ premises to supplement the provision offered in their main
campus sites. The former involve a wide range of locations, including schools, libraries, and public/community halls and flats. Sixty six percent of colleges report that they use 16 or less community-based locations and 66% of colleges report that they use 30 or fewer work-based locations.

The main focus of community-based provision tends to be on core skills, return to study, pre-access and access courses, but also includes a wide range of NC and HN units/programmes and in two colleges, degree level provision. Most colleges emphasise flexibility, with all modes of access available and many colleges operate their community-based centres five days and evenings per week, plus weekends. Provision in work-based locations tends to focus on SVQ levels II and III and courses to meet the needs of students recruited via the New Deal and Skillseekers programmes, and includes some colleges offering programmes tailored to meet the educational and training needs of individual employers. Other locations include a mix of facilities and provision, ranging from IT access in mobile units, personal development and special needs provision in adult training centres and a range of education and training contracts involving remand centres and prisons and army and naval personnel.

Around three quarters of the colleges (72%) plan developments of some kind – either to their main campus or to other sites – 38% plan developments to both the main campus and to other sites. Of the remaining colleges, 21% stated that no developments were planned at any of their sites. Other colleges indicated that developments were possible but were unable to confirm details, or stated that increases/decreases in demand for college provision would result in appropriate responses in terms of site developments in the future.

Sixteen out of the 47 colleges have student residencies with a total of 1,700 places. Fourteen of these colleges are located in lowland Scotland the remaining two are in Highlands and Islands region.

There is regional variation in the extent to which colleges use locations outwith the main campus sites. For example, Dunbartonshire, Grampian and Renfrewshire make more use of community-based locations than the national norm and Ayrshire, Forth Valley and Highlands and Islands make less use of these locations; Lothian, Fife and Renfrewshire make more use of work-based locations than the national norm and Dumfries and Galloway, Dunbartonshire and Lanarkshire make less use of these locations.

**Enrolments and SUMs**

The National Statistical Profile of college provision shows that enrolments have steadily increased over the three years from 1996 to 1999. In 1998/99 there were 421,524 enrolments. Enrolments in part time vocational courses accounted for 70% of total enrolments and those in full time vocational courses accounted for 16% of the total. Overall, enrolments for vocational courses increased by around 8% during the three year period with most of this increase occurring in the first two
years. In 1998/99 enrolments in non-vocational courses accounted for 14% of the total but also showed the steepest increase (32%) over the three year period.

When trends are considered in terms of SUMs for the same period, again the trend is one of increase. In 1998/99 full time vocational courses accounted for 62% of SUMs, part time vocational courses accounted for 36% of SUMs, and non-vocational courses accounted for just over 2% of total SUMs.

There are, however, regional variations to the picture presented above. For example, over the three year period 1996 to 1999 Ayrshire, Renfrewshire and Glasgow showed an increase in total enrolments of 20% or more compared to the 11% increase nationally, whilst Lothian, Dumfries and Galloway and Lanarkshire experienced a decrease in total enrolments of 7% or more. In 1998/99, for full time vocational courses the regions which exhibit the greatest divergence from the national figure of 16% are Lanarkshire and Ayrshire, where the proportion of enrolments is around 5% higher, whilst in Forth Valley and Borders the proportion of enrolments is at least 6.5% lower. Lanarkshire’s enrolments are 51% above the national proportion. For part time vocational courses the regions which exhibit the greatest divergence from the national figure of 70% are Lothian and Dunbartonshire, where the proportion of enrolments is at least 9.5% higher, whilst in Lanarkshire and Dunbartonshire the proportion of enrolments is at least 21.6% lower. Dunbartonshire’s enrolments are 43% below the national proportion. For non-vocational courses the regions which exhibit the greatest divergence from the national figure of 14% are Dunbartonshire and Borders, where the proportion of enrolments is at least 19.5% higher, whilst in Fife and Renfrewshire the proportion of enrolments is around 9% lower. Dunbartonshire’s enrolments are over 200% higher than the national proportion.
The table below shows the share of total enrolments and SUMS region by region in 1998/99 and a comparison of enrolments by full time vocational, part time vocational and non-vocational.

Table 1. Enrolments and SUMs (1998/9)

<table>
<thead>
<tr>
<th>Region</th>
<th>Regional % of total enrolments</th>
<th>Regional % of total SUMs</th>
<th>FT vocational</th>
<th>PT vocational</th>
<th>Non-vocational</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ayrshire</td>
<td>3.3</td>
<td>4.6</td>
<td>22.5</td>
<td>+6.5</td>
<td>57.4</td>
</tr>
<tr>
<td>Borders</td>
<td>1.9</td>
<td>1.5</td>
<td>11.1</td>
<td>-4.9</td>
<td>55.4</td>
</tr>
<tr>
<td>Dumfries &amp; Galloway</td>
<td>1.9</td>
<td>2.1</td>
<td>19.3</td>
<td>+3.3</td>
<td>73.8</td>
</tr>
<tr>
<td>Dunbartonshire</td>
<td>2.2</td>
<td>2.4</td>
<td>16.8</td>
<td>+0.8</td>
<td>39.9</td>
</tr>
<tr>
<td>Fife</td>
<td>8.9</td>
<td>8.6</td>
<td>15.6</td>
<td>-0.4</td>
<td>79.6</td>
</tr>
<tr>
<td>Forth Valley</td>
<td>6.9</td>
<td>4.9</td>
<td>11.0</td>
<td>-5.0</td>
<td>61.3</td>
</tr>
<tr>
<td>Glasgow</td>
<td>22.3</td>
<td>21.4</td>
<td>15.3</td>
<td>-0.7</td>
<td>66.6</td>
</tr>
<tr>
<td>Grampian</td>
<td>9.5</td>
<td>8.3</td>
<td>13.8</td>
<td>-2.2</td>
<td>79.1</td>
</tr>
<tr>
<td>Highlands &amp; Islands</td>
<td>6.5</td>
<td>6.3</td>
<td>17.2</td>
<td>+1.2</td>
<td>73.5</td>
</tr>
<tr>
<td>Lanarkshire</td>
<td>7.1</td>
<td>9.3</td>
<td>24.2</td>
<td>+8.2</td>
<td>48.4</td>
</tr>
<tr>
<td>Lothian</td>
<td>15.5</td>
<td>13.6</td>
<td>11.4</td>
<td>-4.6</td>
<td>82.2</td>
</tr>
<tr>
<td>Renfrewshire</td>
<td>6.3</td>
<td>8.2</td>
<td>19.7</td>
<td>+3.7</td>
<td>75.0</td>
</tr>
<tr>
<td>Tayside</td>
<td>7.8</td>
<td>8.7</td>
<td>19.8</td>
<td>+3.8</td>
<td>67.6</td>
</tr>
<tr>
<td>National</td>
<td>100</td>
<td>100</td>
<td>16</td>
<td>70</td>
<td>14</td>
</tr>
</tbody>
</table>

**Enrolments by qualifications**

The national data shows that almost half (43%) of all enrolments in 1998/99 were for National Certificate, GSVQ, and other FE (which range from adult basic education to level 3 qualifications). Courses which do not lead to qualifications accounted for 19%. HNC/D and other HE accounted for 17% and non-vocational courses accounted for 14%. The lowest amount of enrolments (6.5%) were for VQs. In terms of the subject groupings, Science and Technology, Care, Services, and Business accounted for the majority of enrolments with fewer enrolments for Arts/Humanities/Social Sciences, and Information Technology.

Again there are regional variations in this national picture. In 1998/99, for National Certificate, GSVQ, and other FE the regions which exhibit the greatest divergence from the national figure of 43% are Dumfries and Galloway and Grampian, where the proportion of enrolments is at least 14% higher, whilst in Forth Valley and Tayside the proportion of enrolments is at least 9% lower. Dumfries and Galloway’s enrolments are 63% above the national proportion. For courses which do not lead to qualifications the regions which exhibit the greatest divergence from the national figure of 19% are Tayside and Lothian, where the proportion of enrolments is at least 9% higher, whilst in Lanarkshire and Dumfries and Galloway the proportion of enrolments is 15% lower. Lanarkshire’s enrolments are almost 77% below the national proportion. For HNC/D and other HE the regions which exhibit the greatest divergence from the national figure of 17% are Lanarkshire and Grampian, where the proportion of enrolments is at least 4.8% higher, whilst in
Borders and Dumfries and Galloway the proportion of enrolments is at least 5.9% lower. Borders enrolments are 65% below the national proportion. For non-vocational courses the regions which exhibit the greatest divergence from the national figure of 14% are Dunbartonshire and Borders, where the proportion of enrolments is at least 19%, higher whilst in Fife and Renfrewshire the proportion of enrolments is 9% lower. Dunbartonshire’s enrolments are 200% above the national proportion. For VQs the regions which exhibit the greatest divergence from the national figure of 6.5% are Fife and Lothian, where the proportion of enrolments is at least 2.4% higher, whilst in Dunbartonshire the proportion of enrolments is 4.4% lower. Dunbartonshire’s enrolments are almost 68% below the national proportion.

The table below gives a comparison of enrolments by level of qualification region by region for 1998/99.

Table 2. Enrolments by qualifications (1998/99)

<table>
<thead>
<tr>
<th>Level of Qualification</th>
<th>Non-voc</th>
<th>VQs</th>
<th>HN</th>
<th>NC, etc.</th>
<th>No Qual.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ayrshire</td>
<td>20.0</td>
<td>+5.7</td>
<td>6.3</td>
<td>-0.1</td>
<td>19.8</td>
</tr>
<tr>
<td>Borders</td>
<td>33.6</td>
<td>+19.3</td>
<td>8.0</td>
<td>+1.5</td>
<td>5.8</td>
</tr>
<tr>
<td>Dumfries &amp; Galloway</td>
<td>6.9</td>
<td>-7.4</td>
<td>7.4</td>
<td>+1.0</td>
<td>10.8</td>
</tr>
<tr>
<td>Dunbartonshire</td>
<td>43.3</td>
<td>+29.1</td>
<td>2.1</td>
<td>-4.4</td>
<td>12.3</td>
</tr>
<tr>
<td>Fife</td>
<td>4.8</td>
<td>-9.5</td>
<td>8.9</td>
<td>+2.4</td>
<td>18.3</td>
</tr>
<tr>
<td>Forth Valley</td>
<td>27.7</td>
<td>+13.4</td>
<td>4.8</td>
<td>-1.7</td>
<td>14.9</td>
</tr>
<tr>
<td>Glasgow</td>
<td>18.1</td>
<td>+3.8</td>
<td>4.8</td>
<td>-1.6</td>
<td>15.8</td>
</tr>
<tr>
<td>Grampian</td>
<td>7.1</td>
<td>-7.2</td>
<td>6.2</td>
<td>-0.2</td>
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</tr>
<tr>
<td>Highlands &amp; Islands</td>
<td>9.4</td>
<td>-4.9</td>
<td>8.2</td>
<td>+1.8</td>
<td>15.6</td>
</tr>
<tr>
<td>Lanarkshire</td>
<td>27.4</td>
<td>+13.1</td>
<td>4.8</td>
<td>-1.6</td>
<td>24.2</td>
</tr>
<tr>
<td>Lothian</td>
<td>6.4</td>
<td>-7.8</td>
<td>10.0</td>
<td>+3.6</td>
<td>13.7</td>
</tr>
<tr>
<td>Renfrewshire</td>
<td>5.2</td>
<td>-9.0</td>
<td>4.7</td>
<td>-1.7</td>
<td>17.7</td>
</tr>
<tr>
<td>Tayside</td>
<td>12.6</td>
<td>-1.7</td>
<td>4.8</td>
<td>-1.6</td>
<td>16.7</td>
</tr>
<tr>
<td>National</td>
<td>14.3</td>
<td>6.5</td>
<td>16.7</td>
<td>43.2</td>
<td>19.4</td>
</tr>
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</table>

Another component of this review was information on the nature and extent of private provision of training in Scotland. Acquiring reliable data proved difficult, but the statistical data contained in SQA and City and Guilds databases give some partial insights in terms of comparing the provision of Private Training Organisations (PTOs) and FE colleges. The databases show that whilst PTOs feature in the provision of training at all levels of qualifications, overall they provide a small fraction in comparison to FE colleges. For example, in 1998/99 FE colleges accounted for 60% of all NC modules delivered whilst PTOs accounted for less than 2%. Similarly FE colleges for accounted for 93% of all HN provision whilst PTOs accounted for less than 1%. The main contribution of PTOs is in VQs where the level of provision of SQA awards is almost the same as for colleges. PTOs contribute to provision in all regions with the exception of Borders.
**Students and subjects**

In the statistical data students are defined as those enrolled on vocational courses of more than 30 hours duration. Overall there are more women than men, but in the younger age groups (up to age 20) there are more male students. Students aged 21 or over make up 46% of male students and 59% of female students. The subjects studied are heavily patterned by age and gender. IT is popular with older students. Science and Technology is predominantly studied by men and Care and Business courses are more likely to be studied by women. The gender and subject patterns show little variation at regional level from the national picture.

**Student clusters**

The National Statistical Profile gives information on students in a small number of distinct groups termed clusters. The description of the cluster is in terms of the most typical student. The clusters used and the proportion of students in each in the nation as a whole were type F - Full time students (29%), type P - Part time students (21%), type E - Evening/weekend students (19%), type D - Distance/open learning students (19%), type S - Short part time students (13%). Type F is the most prevalent and most coherent cluster (fewer atypical students than in the other clusters) whilst type S is the least prevalent and coherent cluster.

There are some noticeable regional variations. In 1998/99, for cluster F the regions which exhibit the greatest divergence from the national figure of 29% are Highlands and Islands and Fife, where the proportion of students is at least 9% higher, whilst in Border and Lothian the proportion of students is at least 6% lower. Highlands and Islands’ proportion of students is 34% above the national proportion. For cluster P the regions which exhibit the greatest divergence from the national figure of 21% are Ayrshire and Grampian, where the proportion of students is at least 6% higher, whilst in Dunbartonshire and Dumfries and Galloway the proportion of students is at least 4% lower. Ayrshire’s proportion of students is 38% above the national proportion. For cluster E the regions which exhibit the greatest divergence from the national figure of 19% are Borders and Grampian, where the proportion of students is at least 8% higher, whilst in Dunbartonshire and Dumfries and Galloway the proportion of students is at least 7% lower. Grampian’s proportion of students is 63% above the national proportion. For cluster D the regions which exhibit the greatest divergence from the national figure of 19% are Lothian, where the proportion of students is 5% higher, whilst in Lanarkshire and Dumfries and Galloway the proportion of students is at least 15% lower. Lanarkshire’s proportion of students is 84% below the national proportion. For cluster S the regions which exhibit the greatest divergence from the national figure of 13% are Dumfries and Galloway, where the proportion of students is 21% higher, whilst in Grampian and Ayrshire the proportion of students is at least 6% lower. Dumfries and Galloway’s proportion of students is 162% above the national proportion.
The table below gives a comparison of student clusters region by region for 1998/99.

Table 3. Student clusters (1998/99)

<table>
<thead>
<tr>
<th>Region</th>
<th>F</th>
<th>P</th>
<th>E</th>
<th>D</th>
<th>S</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ayrshire</td>
<td>33</td>
<td>29</td>
<td>26</td>
<td>6</td>
<td>-13</td>
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<td>23</td>
<td>28</td>
<td>15</td>
<td>-4</td>
</tr>
<tr>
<td>Dumfries &amp; Galloway</td>
<td>34</td>
<td>16</td>
<td>12</td>
<td>4</td>
<td>-15</td>
</tr>
<tr>
<td>Dunbartonshire</td>
<td>35</td>
<td>17</td>
<td>12</td>
<td>15</td>
<td>-4</td>
</tr>
<tr>
<td>Fife</td>
<td>38</td>
<td>24</td>
<td>13</td>
<td>14</td>
<td>-5</td>
</tr>
<tr>
<td>Forth Valley</td>
<td>30</td>
<td>25</td>
<td>25</td>
<td>10</td>
<td>-9</td>
</tr>
<tr>
<td>Glasgow</td>
<td>31</td>
<td>21</td>
<td>19</td>
<td>15</td>
<td>-4</td>
</tr>
<tr>
<td>Grampian</td>
<td>31</td>
<td>27</td>
<td>31</td>
<td>5</td>
<td>-14</td>
</tr>
<tr>
<td>Highlands &amp; Islands</td>
<td>39</td>
<td>20</td>
<td>15</td>
<td>11</td>
<td>-8</td>
</tr>
<tr>
<td>Lanarkshire</td>
<td>34</td>
<td>20</td>
<td>24</td>
<td>3</td>
<td>-16</td>
</tr>
<tr>
<td>Lothian</td>
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<td>18</td>
<td>16</td>
<td>24</td>
<td>-3</td>
</tr>
<tr>
<td>Renfrewshire</td>
<td>32</td>
<td>21</td>
<td>22</td>
<td>9</td>
<td>-10</td>
</tr>
<tr>
<td>Tayside</td>
<td>31</td>
<td>21</td>
<td>20</td>
<td>17</td>
<td>-2</td>
</tr>
<tr>
<td>National</td>
<td>29</td>
<td>21</td>
<td>19</td>
<td>19</td>
<td>13</td>
</tr>
</tbody>
</table>

Mode of study

Analysis by mode of study in the National Statistical Profile provides information on study patterns by gender. Open/distance learning and evening and weekend study are more likely to be undertaken by women whilst day/block release has a higher proportion of male students.

Fee types

The National Statistical Profile shows that part-time day fee (those where payment is made by the student or his/her employer), fee waivers and standard fees account for the majority of students – 27%, 25% and 26% respectively. Evening/weekend fees accounts for 16% and Government Training Scheme fees (GTS) accounts for 6%. When analysed in terms of gender 30% of male students are in the part-time day fees group as opposed to 25% of female students, whilst 29% of female students are in the fee waiver groups as opposed to 21% of male students. 10% of students on Government Training Schemes are male whilst only 3% are female. It is interesting to note that the Private Providers study shows that many of the PTOs are involved in training for Skillseekers and Modern Apprenticeships, suggesting that this is one area where they compete successfully with colleges.
Analysis at regional level shows some variation from the national picture. In 1998/88 for part-time day fee variations from the national proportion of 27% range from +12% in Fife to -10% in Forth Valley; for fee waivers variations from the national proportion of 25% range from +9% in Glasgow to -16% in Dumfries and Galloway; for standard fees variations from the national proportion of 26% range from +9% in Dumfries and Galloway to -9% in Fife; for evening/weekend fees variations from the national proportion of 16% range from +11% in Grampian to -6% in Tayside; and for GTS variations from the national proportion of 6% range from +12% in Fife to -5% in Glasgow.

The table below gives a comparison of students and type of fee region by region for 1998/99.

Table 4. Students and type of fee (1998/99)

| % of fee types in each regional and difference from the national figures | Standard | Fee waiver | GTS | PTday | Evening/weekend |
|------------------------------------------------☰---------------------------------------------------------------|
| Ayrshire | 32 | +7 | 17 | -8 | 11 | +4 | 21 | -6 | 20 | +4 |
| Borders | 19 | -6 | 18 | -7 | 9 | +2 | 27 | +1 | 26 | +10 |
| Dumfries & Galloway | 35 | +9 | 9 | -16 | 10 | +4 | 34 | +7 | 12 | -3 |
| Dunbartonshire | 33 | +8 | 25 | -1 | 6 | 0 | 26 | -1 | 10 | -5 |
| Fife | 16 | -9 | 16 | -9 | 18 | +12 | 39 | +12 | 10 | -5 |
| Forth Valley | 23 | -2 | 33 | +8 | 10 | +3 | 16 | -10 | 18 | +3 |
| Glasgow | 25 | 0 | 35 | +9 | 2 | -5 | 25 | -2 | 13 | -2 |
| Grampian | 27 | +1 | 18 | -7 | 6 | 0 | 22 | -5 | 27 | +11 |
| Highlands & Islands | 28 | +3 | 19 | -6 | 8 | +1 | 30 | +3 | 14 | -1 |
| Lanarkshire | 33 | +7 | 18 | -7 | 3 | -3 | 27 | 0 | 19 | +3 |
| Lothian | 18 | -8 | 29 | +3 | 6 | 0 | 32 | +5 | 14 | -1 |
| Renfrewshire | 27 | +2 | 26 | 0 | 3 | -4 | 27 | 0 | 18 | +2 |
| Tayside | 31 | +5 | 30 | +5 | 10 | +3 | 19 | -8 | 9 | -6 |
| National | 26 | 25 | 6 | 27 | 16 |

Flexible and on-line learning

Forty six of the 47 colleges are providing flexible learning and 33 colleges are providing on-line learning. Of the colleges which do provide flexible learning, 27% report this is a relatively small area of provision but one which is expected to grow. A similar proportion report that this is an increasingly important area of provision, and 15% report this as a very significant area of provision accounting for as much as 32% of all activity. Almost all colleges report that they intend to develop further this provision in the future.

Of the 70% of colleges providing opportunities for on-line learning, 60% report that this provision is small or tied to a specific subject. This provision is, therefore, less pervasive than flexible learning and limited in both range and content. Almost all

1 Government Training Scheme
colleges intend developments in this form of provision as a significant element of their future learning strategy. This is linked to plans to increase flexibility and efficiency. Planned developments are taking place with the support of national or regional frameworks such as COLEG, the UHI project, SUfI, GTN, SESNET and WESSNET. Specific drivers for the future developments include collaborative projects to meet the needs of employers and Higher Still projects.

Provision serving regional or national markets

Almost 90% of colleges offer programmes/courses which generate student demand from outwith their local catchment area, and 81% offer courses which serve both national and regional markets. Two colleges indicate that all their provision generates demand from a national market. For the remaining colleges, 10 attract less than 100 students on average each year from these wider markets whilst at the other end of the spectrum, a similar number attract over 1,000 students per year. This latter group is concentrated in the large city colleges and those located in major regional centres, with two of the former recruiting over 6,000 students between them via open learning provision across a range of programme areas. The four colleges with no provision of this nature include one island college and three of the five colleges in Lanarkshire.

Collaboration with others

All the colleges are currently working collaboratively with fellow FE colleges, 83% in partnership with Scottish HEIs, 94% in partnership with schools, and 94% work with other organisations.

Collaboration within the FE sector is widespread and 80% of colleges plan to modify existing collaborative links or develop new links within the sector. The majority of significant links identified reflect initiatives involving bilateral agreements or small informal groups of colleges acting in partnership, based on sharing geographical or curricular interests, outwith the more formal national and regional frameworks. A number of colleges also refer to collaboration involving national or regional organisations and consortia such as ASC, COLEG, GCG, GTN, and the UHI project. The collaborative opportunities offered by these organisations are valued by colleges for their contribution to colleges’ ability to meet the demands for education and training.

Analysis shows, in general, colleges with formal HEI links have developed them with more than one institution, 25% having developed links with two, almost 20% with three, and 20% with four or more. Excluding articulation agreements which were not surveyed, the most pervasive form of links with HEIs are joint access programmes which are available through 51% of colleges and responsible for the recruitment of 20% of all students recruited annually across the four forms of joint provision surveyed. Whilst some of these access programmes relate to SWAP or other regional initiatives, only three colleges identify this type of agreement as their only form of joint access provision suggesting that the majority reflect bilateral
agreements between FE colleges and HEIs or small groups acting in concert. Though widely supported, some colleges express reservations about the lack of clear strategic vision in shaping the development and operation of Access courses. Joint course provision and validated programmes are offered in approximately one third of colleges.

Ninety four percent of colleges collaborate with schools and engage in numerous forms of linked activity, ranging from joint curriculum planning, joint staff development programmes, college staff offering careers/guidance and advice, to direct course provision in schools and colleges. Many of these links reflect specific local conditions and agreements but broad patterns of activity, which apply more generally, can also be identified. Each of the four categories of collaborative activity: school links programmes, taster courses, Highers revision courses, and links in support of school students with special education needs, are identified as being offered by at least 19% of colleges.

The development of the Higher Still framework is identified by over 40% of colleges as a major focus for short to medium term development in school/college collaboration. Here, rather than competing with schools, the emphasis appears to be on the colleges seeking areas for development which complement the schools’ provision. More generally, the development of joint group awards is seen as part of a desire to improve the linkage between schools and further and higher education.

Almost all colleges have collaborative links with other organisations. Broad patterns of collaborative links can be identified with LECs, Community Education, other training providers, voluntary organisations and local councils. However, the level of all forms of collaborative activity reported above may understate the potential of these links. One respondent expressed this succinctly:

‘The most difficult problem colleges face is the unwillingness of other players to engage in collaborative relationships, ...HEIs, LECs, (and others) all fail to act in ways which recognise the strengths and capabilities of FE colleges. Colleges frequently find themselves undervalued or overlooked as partners and are rarely accorded equal status.’

**What is the distinctive contribution of the FE sector?**

Senior people in national agencies and in Glasgow and Grampian regions responded to this question.

Respondents from national agencies identified a number of distinctive features including the wide range of programmes at all levels, flexible modes of delivery, accessibility and the appeal to people from diverse backgrounds. One respondent spoke about a national service delivered locally and another felt that the ‘unique point of FE is process and this student centred approach should be developed and promoted.’ Others spoke in terms of specialist expertise supporting businesses and strong links with markets and employers.
Respondents from Glasgow agencies identified the distinctive features of FE as the provider of both a broad range of accessible programmes and of specialist vocational training. Colleges also catered for learning needs that would otherwise not be met. One respondent commented that ‘FE provides an excellent “second chance” education and training experience with excellent progression opportunities to employment and higher education.’ Another noted that FE addresses and supports the broad aims of government initiatives, particularly lifelong learning and social inclusion. Overall FE in Glasgow was considered distinctive in terms of the range of interfaces with schools, employers and employees, HEIs and the community.

For respondents from Grampian agencies FE was closely identified with vocationally relevant study and the ability to equip individuals with the skills necessary to enter and develop in the job market. There was also a general view that FE has a broad appeal that is unique. As well as the vocational provision already mentioned, FE was viewed as a major provider of special needs and community-based courses that would not be available otherwise. The ability of FE to interface with schools, employers and employees, HEIs and the community was acknowledged. Many respondents commented on how colleges looked to the student as a whole and provided good guidance and support mechanisms.

It is clear from these responses that the ways in which colleges interface with schools, employers and employees, HEIs and the community is both a distinctive and recurrent theme. Equally interesting is the view, expressed most explicitly by respondents from national agencies and in Grampian, of how FE is distinctive in viewing and treating students holistically.

**What is the distinctive contribution of private providers?**

The Private Providers study addressed this question, supplemented by responses from senior people in national agencies nationally and in Glasgow and Grampian regions.

The survey suggested that there are somewhere less than 300 private providers in Scotland. They concentrate on VQs, mainly at Levels I-III, though many are seeking to diversify the training on offer to reduce dependence on LEC funding. They vary considerably in terms of the volume of training they conduct. Provision is dominated by a few large organisations which operate on several sites.

Respondents from the national agencies did not see the private training sector as a homogenous group. They suggested that private provision was more closely associated with specialised markets and concentrated on skills related to current employment which are not necessarily transferable skills. A few respondents expressed the view that private providers may have better links than colleges with industry and employers.
Respondents in Glasgow found it difficult to identify distinctive aspects of private provision. Limited experience meant answers were short and not always particularly focused for some interviewees, whilst others had very strong but opposing views. For example, one respondent expressed the opinion that private providers are less flexible than FE, whilst another took the view that private providers can be more flexible than FE. There was, however, a general impression that private provision is more likely to deal with niche markets.

Respondents in Grampian also found it difficult to identify distinctive aspects of private provision and comments showed great variety. What did emerge was a general perception of more limited provision, in terms of both physical location and range of programmes, and more flexibility in approach and delivery. This was also consistent with the view of some respondents that private providers tended to identify and react to changes in the local economy with more ease than colleges. However, this generally positive view must be somewhat tempered by comments relating to the consistency of provision and the longevity of providers. Outwith private providers, voluntary and not-for-profit groups which are involved in a number of fields related to social inclusion and widening access were also identified and there was a view that these organisations worked well within their specific areas.

**How effective are colleges in meeting the needs of different student groups?**

Senior people in national agencies, Glasgow and Grampian regions, enterprise and employment agencies, Careers Services and Adult Guidance Networks responded to this question.

Many respondents from the national agencies drew on individual experience or impressions to answer this question and made it clear that they were doing so. However, the majority believed that colleges are largely successful in meeting the needs of various groups and that the student body is representative of the wider community.
Most respondents in Glasgow were of the view that colleges had improved in recent years and were making strenuous efforts to meet the needs of an increasingly diverse client base. There was, however, still room for improvement. New Deal was cited as an example of how colleges were making provision for particular disadvantaged groups, but as part of an initiative that is inadequately resourced. The theme of Glasgow as a cluster of villages was also given as an explanation for why an FE response to the needs of different groups at a regional level does not always give positive results.

In general, respondents in Grampian acknowledged that colleges were aware that different groups had different needs and were adopting a more client centred approach to learning but still had some way to go. Issues highlighted included accessibility of promotional and teaching materials, lack of understanding of the needs of some learners, inappropriate learning environments and a failure to properly identify the background of the learner. Student support systems were identified as being generally good and effective, although there were concerns regarding the availability and supply of such services to meet the high level of demand. Respondents were agreed that colleges were effective in special educational needs provision.

A majority of respondents from Careers Services and Adult Guidance Networks said that the colleges were effective or very effective in meeting the education and training demands and needs of different client groups. Colleges' efforts to tailor provision to the various needs of the local communities and different social groups were recognised and appreciated by the great majority of respondents, with childcare facilities especially valued. The growth in the numbers of adults attending FE colleges and young males attending full time was striking.

There was, however, concern about retention and achievement rates, especially among young people. Other areas for improvement included the responsiveness to the needs of those with special or additional support needs, low academic achievers and disadvantaged young people, young males, lone parents, retired people, and farmers, fishermen and others who needed re-training courses.

Almost three-quarters of respondents from the enterprise and employment agencies considered colleges to be effective in meeting the needs of different client groups. Those who felt that colleges were less than effective in meeting needs expressed this mainly in terms of specific groups such as particular age groups and those with social/behavioural problems. Other comments related to the theme of improving flexibility and access which would help to surmount such barriers to participation as caring responsibilities and work commitments.

How effective are colleges overall?

Senior people in national agencies, Glasgow and Grampian regions, regional enterprise and employment agencies, Careers Services and Adult Guidance Networks responded to this question.
Some national agency respondents felt they lacked sufficient knowledge to comment in detail and were therefore only able to give a broad overview of FE performance. Nevertheless, there was broad agreement that colleges provided a very good range of programmes and qualifications, which allowed people to progress to different levels. There was also a view that colleges were actively encouraging wider access and participation. Flexibility and consistency were two areas which could be improved and several respondents felt that provision outwith the main college campus was still too limited. One respondent commented that qualifications are ‘too large’ for business needs which is consistent with comments made for other questions relating to a need for more short and ‘taster’ courses tailored to the needs of employers, employees and the community at large. Another respondent, in terms of flexibility and responsiveness, commented that, whilst it was not the only model, the UHI project was appropriate for FE generally. Another respondent expressed the view that attending college was widely perceived to be a second best option for those who failed to gain a university place.

The majority of respondents in Glasgow felt unable to judge college performance across all areas and instead preferred to confine their views to areas where they felt they could usefully comment. A general view was that FE has major strengths in the range and level of provision but there are weaknesses in terms of accessibility, flexibility and responsiveness, and in projecting the image of a modern, up-to-date service.

The range of outreach, community-orientated provision was viewed as limited and in need of development if wider access is to be achieved. There was also a feeling from some respondents that colleges in Glasgow were not consistent in their performance across the city or in their ability to be flexible. Concern was also expressed about variations in quality and finite resources too thinly spread. Access and on-line learning were two particular areas where weaknesses were identified, although the situation was considered to be a fluid one with many changes in the pipeline. There was a view that colleges must engage more with business and industry and be more proactive in order to provide programmes with outputs that are geared to employability.

The majority of respondents in Grampian also felt unable to comment in detail on college performance. There was broad agreement that colleges in the region provided a very good range of programmes and qualifications that allowed people to progress to different levels. However, widening access and increasing participation required the range of provision in terms of outreach and community education to be more widespread. On a related theme, some respondents also raised issues about the availability of childcare and transport. There was some concern expressed about the ability of colleges to operate effectively across a wide range of provision in terms of quality of service and delivery. Some problems were also highlighted regarding interpretation of market trends, consistency of performance, quality assurance linked to training, currency of staff skills, and
facilities available for use. Most respondents expressed the view that many of the
issues raised could be addressed by improved partnership and collaboration with
and between colleges, schools, higher education, employers and other agencies,
to ensure a spread of activity in all areas of provision and throughout the region. It
was clear that colleges have an ‘image problem’ and that perceptions do not
always square with reality. There was also a view from some respondents that
colleges are well aware of these areas of weakness and are addressing them.

Almost all respondents from Careers Services and Adult Guidance Networks were
satisfied or very satisfied with the subject areas and levels of qualification offered
by colleges. Recent improvements in provision were noted. Comment related to the
wide range of courses available, allowing people with few or no qualifications from
school to access education which could progress through to degree level. This was
especially valued in rural areas where demand for labour was limited. The subject
provision was seen to meet local needs and job opportunities in most cases. They
were satisfied or very satisfied with the modes and accessibility of courses offered
by colleges. Around half of the respondents identified a need for more start dates
for courses, and more year around provision (especially starts during May to
August) to satisfy demand from various client groups. More part time and evening
courses were needed and classes better timed for parents and people on low
incomes. Whilst recognising recent improvement, around half the respondents
wanted to see more flexibility: specifically to respond to demand at Access level,
and to meet the needs of employees in firms which use flexible work practices.
Almost all respondents expressed satisfaction with the quality of provision offered
by colleges. Respondents tended to view quality in terms of progression
opportunities, which were generally seen to be good. However, some respondents
noted and expressed dissatisfaction that destination data is not at all readily
available for FE students. Better pre-course and pre-exit guidance was also
needed. Around a quarter of respondents noted problems where clients were
recruited onto courses for which they were not qualified and where they then
subsequently struggled with the work.

Two thirds of respondents from the enterprise and employment agencies were
satisfied with the subject areas and levels offered. Those reporting satisfaction
also noted that colleges had and were continuing to make efforts to improve their
provision. The more critical comments were often related to colleges not meeting
some specific areas of demand, such as participating in TfW programmes.

Around half of respondents were very satisfied or satisfied with modes and
accessibility of provision. Criticisms focused on the inflexibility of the academic
year – particularly in terms of roll on/roll off for New Deal clients – and insufficient
flexible and distance learning to meet demand. Those reporting satisfaction felt
that the colleges in their areas were becoming more flexible and accessible and
were looking at ways of further improving this. Two thirds of respondents were
very satisfied or satisfied with the quality of provision. Several respondents
expressing satisfaction reported on the extent to which colleges are monitored and
audited via SQMS and SQA as evidence of quality. Others referred to lIP. One
respondent, who expressed dissatisfaction, noted that this referred more to provision that clients could not access, whilst the quality of provision offered did meet the needs of clients who could access it.

**What are the areas of growth and decline; where are the gaps?**

Colleges and representatives of all other agencies interviewed or surveyed responded to this question. The Labour Market study and Statistical Profiles were additional sources of information. It is clear, after analysis at both regional and national level that the information contained in the regional summaries gives a more accurate and useful presentation of the data for assessing adequacy at local and regional level and for the identification of needed developments in provision. Whilst aggregation of data at national level masks both differences and similarities in the perspectives of colleges and their users on gaps in provision and changes in patterns of demand and need it allows an assessment of the overall adequacy of provision.

**What are the areas of growth; where are the gaps?**

To map the major features of changing patterns of demand, colleges were asked to identify the areas of study in which they had experienced the greatest increases in demand over the period 1996 to 1999. The top three areas of growth are identified as IT/Multimedia; Sport, Leisure and Recreation studies; and Caring (Health, Social, Child, Pre-nursing). These are closely followed by Business, Administration, and Management provision; Beauty Therapy/Hairdressing; and Engineering. Some general inferences can also be drawn from the responses about increases in relation to mode of delivery. For example, in the area of IT and Multimedia and Caring, colleges reported equal levels of increasing demand for both full-time and part-time provision.

Over 70% of colleges identified gaps where there was some provision but this did not satisfy demand. The main gaps identified are:

- IT / ICT (all modes including flexible and all levels)
- Beauty Therapy (including NC and day release)
- Hospitality and Tourism (including full and part-time provision and NC)
- Sports Studies (all modes)
- Work-based SVQs.

Two thirds of colleges identified gaps where there was no provision. Overall, the main gaps identified are:

- Specific aspects of ICT
- E-commerce (full and part-time, short courses)
- Animal Care (full, part-time and distance)
- Call Centre training (full-time and part-time).
Several colleges also considered that gaps exist in courses for disaffected learners and in core skills, and in the extent of provision in community or outreach locations.

The areas of study identified as being most likely to experience increases in demand (2000 – 2003) suggest that colleges see the trends which have developed over the preceding period continuing, with IT, Sport and Leisure, and Care dominating the projected increases. Anticipated increases in demand for Access level courses and for the provision of core skills were identified by at least 15% of colleges.

Respondents from the national agencies felt that employment trends, and therefore training needs, would broadly follow current patterns. More specifically they anticipated growth in the service sector and in particular in Tourism, Leisure and Care. A key growth area was ICT and included in this was on-line learning, on-line tutor support, and provision in the areas of e-commerce, entrepreneurial skills and more general business education. Finally they identified a need to increase pre-entry core skills programmes, short course provision and ‘tasters’. One respondent considered that colleges should concentrate on those in work and another commented that electronic delivery might actually hamper wider access.

The programme areas in greatest demand, noted by around half of respondents in Careers Services and Adult Guidance Networks, were Business; Sports, Recreation, and Leisure; Care; and Childcare. Around a quarter of the respondents noted Hairdressing and Beauty; Engineering; Art and Design; Construction; Information Technology and Computing; Catering/Hospitality; and Land Based Industries. Noted by a few respondents were Motor Vehicle; Travel and Tourism; Social Sciences; Clerical and Administration; Manufacturing and Special Needs.

A little more than half of the respondents in this group identified gaps in current provision. Respondents noted a wide range of areas where provision exists but does not meet local demand including areas where provision exists but with a focus which is not entirely appropriate for local needs. In Business courses, for instance, respondents considered that there was a need for more emphasis on export business and languages. Some gaps were in courses not provided in locations outwith a main college campus and included basic IT skills, Construction, Drama and Engineering. The remaining gaps identified included Agriculture, Childcare, Computing and IT, Horticulture and Sport and Leisure. Gaps where provision does not exist locally were identified in subject areas where, based on local labour market information, future growth is anticipated, most notably in Business and Commerce and in the service sector, for example, Sports, Leisure and Recreation; Care and Childcare.

Just over half the respondents noted gaps in traditional areas of the FE curriculum such as Business at intermediate level, Childcare at HN level, Hairdressing and Beauty Care/Therapy and Sports, Leisure, and Recreation. Other gaps were in specialist areas such as Greenkeeping. An interesting set of gaps was in areas not widely featuring in the FE curriculum, at least until very recently, such as
Aeronautical Engineering, Access courses for classroom assistants, Animal Care and Veterinary Nursing.

Respondents in this group cited labour market information as the main basis for forecasting and anticipated growth areas to be in the service and business sectors, with limited mention of other areas such as Computer Aided Engineering, Mechatronics, Electronics, CAD and Horticulture. Anticipated client groups included school leavers (as might be expected from this group of respondents) disaffected young people, unemployed people, people seeking retraining, lone parents and retired people.

The programme areas in greatest demand identified by respondents from the enterprise and employment agencies showed considerable diversity with every respondent identifying several areas. Some were clearly unique to their region – such as Fishing Vessel Engineering. However the areas most often identified were Business Administration, ICT skills, Construction, Catering and technologies including Food Technology and Biotechnology.

Almost three quarters of respondents in this group identified gaps in provision. Programme areas where provision existed but did not meet demand were varied but many related to IT. Examples include business applications such as Word, Excel and Access; web design; e-commerce and e-communications. Programme areas where no provision existed were also diverse and showed no consistent theme but rather reflected particular regional needs. One respondent did not identify specific gaps but reported that the gaps in provision related to opportunities for flexible and distance learning.

The programme areas where growth in demand was anticipated showed considerable similarity to those identified above for current demand and gaps in provision. Thus ICT in its many forms, Care, Call Centre training and the ‘technologies’ all featured in many responses. Other subject areas identified were clearly a response to local circumstances and needs. One respondent expressed the view that growth should also come in areas such as Drama, Music and other ‘leisure activities’ if Lifelong Learning was to be promoted and encouraged. The basis of the forecasts were, in the main, skills strategies and labour market information at both local and national level. One respondent succinctly summed up the modes provision should take as ‘on-line, on-site, open, distance and flexible.’

Analysis of labour market data indicates that, when planning education and training, there is a need to take into account the long term growth of the service sector, both public and business/financial, the long term growth of the distribution, hotel and restaurant sectors and the more limited, but still important, contribution of manufacturing which accounted for 16% of employees in 1997. At a regional level planning should acknowledge and take account of regional variations such as the importance of the business/financial service sectors in the urban regions in the central belt, the relatively high numbers of employees in manufacturing within some regions, noticeably Borders, Ayrshire, Fife, Lanarkshire, Renfrewshire and
Dumfries and Galloway and the continuing importance of energy related employment in Grampian.

Employment trends indicate that, particularly in the service sectors, there are now high percentages of women, many of whom work part-time. Many of these part-time employees will seek education and training opportunities which are also part-time, flexible and can be fitted around other responsibilities. This could be equally true – if not more so – for full time employees.

There is evidence of a longer term trend towards more jobs in the more skill-intensive and knowledge-based occupations. These require higher levels of qualifications and skills and education and training services will require to provide programmes which are responsive to these needs. However appropriate learning opportunities must also be available for employees in less skilled occupations, both to meet their immediate needs but also to provide opportunities for Lifelong Learning to enhance their employability. If this is not addressed there is a danger that the social and economic division between the educational ‘haves’ and ‘have nots’ will be reinforced.

There are regional variations in the percentages of working age people who are in employment, with Glasgow and Ayrshire having percentages which are noticeably below the national average whilst Grampian is considerably above the average. These clearly reflect differences in the overall labour market conditions in these regions.

Overall, 78% of registered claimants are male. Regional variations are small but the figures do suggest that claimants in Glasgow are more likely to be unemployed for over a year than people elsewhere in Scotland. By contrast unemployment is more likely to be short term in Borders and Grampian. Related to this is the relatively low level of participation in employment among the 50+ age group. This highlights the need to encourage the greater participation of men and older people, to ensure that they have opportunities for Lifelong Learning, either for employment or for other forms of productive participation in society.

What are the areas of decline?

Responses from colleges show Engineering and Business to be the most commonly identified areas of decline. For Engineering, the decrease is particularly associated with HNC/D provision, whilst for Business it applies across all levels. In both cases, decline in demand is associated most clearly with full-time provision. They anticipated decreases in demand in Engineering and traditional Business subjects mostly on a full-time basis.

Very few respondents from the national agencies identified areas of decline. Looking forward it was suggested that, as flexibility improved, ‘mainstream’ full-time provision may decline. One respondent commented that there would be less
demand overall for programmes that lead to qualifications and for full-time provision but more demand for people/company development programmes.

Careers Service and Adult Guidance Network respondents cited labour market information, general occupational trends, and information from enterprise agencies as the main basis for the forecasts. Areas of declining demand were in Engineering, Manufacturing, traditional Business and commercial topics, Motor Vehicle, and basic introductory courses in Construction. Justifications in predicting areas of decline in particular regions included a decline in NC Engineering, because school leavers were aspiring to HN level courses; in Hairdressing and Hospitality because local employers preferred to do their own training; and in languages, because of the poor skill level of school leavers.

Enterprise and employment agencies identified Textiles, Manufacturing and trades associated with traditional industries as areas of decline. Areas identified by some respondents as currently areas of greatest demand and/or growth areas – such as Call Centres and Construction skills – were reported by others as areas of anticipated decline. The sources of information cited were labour market information and local knowledge.

Nationally, analysis of the labour market data shows a steady decline in employment in the manufacturing sector. However this masks some regional variations. In Ayrshire, Borders and Dumfries and Galloway employment in manufacturing remains strong – particularly in Borders where almost 28% of workers are employed in this sector. This reinforces both the areas of decline identified by the groups of respondents above and the importance of identifying regional variations by looking behind the national picture.

The data also reveal a trend towards more jobs in the skills intensive and knowledge based occupations. This supports a view, highlighted in the discussion about areas of growth, that demand will fall for vocational qualifications at the lower end.

**What other improvements are sought from colleges?**

Senior people in national agencies, Glasgow and Grampian regions, regional enterprise and employment agencies, Career Services and Adult Guidance Networks responded to this question. The Review of Policy and Research was an additional source of information.

Several areas for improvement were identified by national agencies but there was considerable diversity in the responses. One respondent highlighted guidance issues, another talked about improvements in management and governance, and yet another identified improved linkages between FE, schools and Community Education. Several respondents identified marketing as an activity that could be improved and several commented on the need to better support and promote Lifelong Learning. Respondents in Glasgow repeated and re-emphasised a
number of issues already raised. A majority of respondents confined their comment to issues relating to communication, collaboration and partnerships. However, a very clear picture did emerge of a sector that needs to close a perceptual gap.

Many of the comments from respondents in Grampian also related to the image of FE and a general view that this was poor in terms of service provided and quality of facilities. It was suggested that colleges needed to become more pro-active in marketing their services and improving communication and co-ordination with other providers, clients and external agencies.

There was a general view that colleges need increasingly to look to the needs of learners and become more demand-led by working more closely with other agencies to gain access to up-to-date information regarding trends and future needs. Finally, some respondents highlighted that changes in delivery methods will impact on the role of the lecturer and that colleges need to be aware of, and prepare for this.

The majority of respondents in Careers Services and Adult Guidance Networks had suggestions for improvements in colleges to better meet the needs of learners, employers and other users. Many were looking for better links and closer co-operation with colleges. They needed more information about courses, in one case more transparent information. The need for improved recruitment practice was identified to ensure that students entered courses in which they had a reasonable chance of a successful outcome. Whilst the increased flexibility of college provision was noted, respondents in this group were seeking even greater flexibility in the availability and timing of courses. There was also comment on the potential for improvements in provision of guidance and support, including identification of additional learning needs at an early stage, careers guidance, linking of provision to the local labour market, access for disabled clients, ancillary support for students with disabilities, and tracking and dissemination of information about college leavers. More generally, they considered that colleges should continue to address the Lifelong Learning agenda and social inclusion issues.

This group of respondents was also asked a more specific question about how colleges might increase and widen participation. Around a third of respondents wanted better and closer co-operation between colleges and others and thought that this would lead to increased and widened participation. The most frequent comments related to the need for improved pre-entry and post-exit guidance, extended work with Community Education, in communities and in rural areas, and development of outreach provision in general. Other suggestions were related to more/better provision for December school leavers, disaffected people, and males with limited qualifications; increasing enrolment points so that people could enrol outside conventional times, maximising the Lifelong Learning agenda; creating a more welcoming environment in colleges; and provision of crèches.
The majority of respondents from enterprise and employment agencies sought improvements from colleges related in the main, to greater flexibility in delivery and approach; greater use of ICT; and further improvements in meeting the needs of employers and learners. These were also considered to be ways in which colleges might increase and widen participation.

The range of policy documents and initiatives discussed in the Review of Policy and Research are all, to some degree, pertinent to this issue of improvement. They may be expressed in terms of roles, responsibilities and targets, but the directives to develop wider access, encourage greater participation, reach out to non-traditional learners and be more responsive to the needs of the many client groups served by colleges, can also be interpreted as things that colleges could do ‘more and better’.

Are changes needed in the location and distribution of colleges?

Colleges and representatives of all other agencies interviewed or surveyed responded to this question. The Statistical Profiles and the Travel to Study Areas report were additional sources of information.

Colleges were asked for their views on the structure of the FE sector: most took the opportunity to comment – in some cases extensively – on this issue. Although respondents did not always use the specific terms, they made a distinction between rationalisation and mergers. It was evident that, where there was support for rationalisation, this was expressed in terms of subjects, programmes and resources. As one respondent noted ‘Duplication of provision is the issue to be addressed.’ Others expanded this theme further through comments relating to the establishment of centres of excellence for specialist activities and disciplines where the resource costs were high.

One set of comments suggested that a focus on the structure of the sector was unhelpful because it shaped discussion in terms related to a supply-led approach rather than on the ability of colleges to respond proactively to local, regional and national demand. Indeed this theme, of colleges as integral parts of their local communities, came through very strongly in a number of responses where concerns were expressed that the importance of the local context was not sufficiently recognised and did not feature strongly enough in central strategic planning. Some respondents argued that mergers would risk losing the link between a college and its community. Others noted that the perceived benefits of mergers were not proven and there was some evidence, from experiences in England, to suggest they could be detrimental.

Respondents from the national agencies expressed the view that the impact of technology would be a major influence on the future structure of FE because location may become less important as supply and demand, change as a consequence of technological advance. Other comments related to problems of rural access and the provision of more outreach centres. One respondent noted that in many towns in Scotland colleges are the main educational institution.
Another suggested that centres of excellence in areas such as Building and Construction could be one model which would better meet demand.

Several respondents in the Glasgow study noted that, if rationalisation is needed, it is at subject, course and/or programme level and others commented that collaboration, not closure or merger, was the way forward. An understanding of Glasgow as a collection of small villages with strong community identity and ‘invisible’ boundaries was considered to be helpful in underpinning and informing decisions for the future.

Most Careers Service and Adult Guidance Network respondents were satisfied or very satisfied with the location and distribution of college provision. Around half the respondents from rural and city areas commented favourably on outreach provision, especially where it was in ‘buggy pushing distance’, although recognising that choice of courses was limited and that the start times of classes could be adjusted to meet client needs. Also appreciated were the provision of buses and the active involvement of many colleges in community-based provision.

In the Highlands and Islands region the limited provision of FE within a realistic travelling distance remained an issue, despite the recent development of outreach centres. Lack of provision, but acceptance that extensive travel or re-location was necessary in order to access provision was also noted in North Fife and the Borders.

Around two thirds respondents in enterprise and employment agencies were very satisfied or satisfied with the location and distribution of college provision. Analysis of the responses indicates that satisfaction or dissatisfaction related, in the main, to the extent to which colleges in the respondent’s area were providing outreach, flexible and distance learning.

**What developments in relationships between FE colleges and other organisations are required?**

Colleges and representatives of all other agencies interviewed or surveyed responded to this question.

Colleges endorsed collaborative arrangements but offered a lukewarm view of formal partnerships. Collaboration was needed in order to provide a comprehensive service to customers and business organisations and relationships were generally good with their many partners. Where the emphasis in these relationships was productivity and progress there was, as one college put it, a ‘win-win’ situation. The relationships were a key to widening access and fostering Lifelong Learning. There was evidence (from around a third of the respondents) that collaboration could be a token gesture, and this was particularly the case in some more formal partnership arrangements. Although formal partnerships had brought in large amounts of money, especially European money, and could work well at local operational level, here, and at strategic level, a number of difficulties
were described. With different funders attempting to achieve similar objectives post-16, there could be confusion over policy and remit, with no clear sense of who does what. Formal partnerships could take up excessive management time in trying to develop a joined-up approach and avoid unnecessary duplication and cost. Not only could they lack leadership and co-ordination, there could be conflicting views on leadership of the structure of the curriculum and a strategic drive. Colleges had a sense of juggling multiple developments with overlapping, but not identical priorities. In one case this was said to be affecting the recruitment of disadvantaged people.

There were also examples of less collaborative relationships and some respondents commented on an unwillingness of others to consult, and this was the case even where the FE sector was required to consult but there was no reciprocation.

There was a general welcome for the demise of the former out-and-out competitive environment which was seen to have damaged the sector. Where competition remained, a case was described of over-provision in some vocational areas and under-provision in more specialised and costly areas. Nevertheless, collaboration and competition could co-exist with advantage.

**Relationships with HEIs**

In general the value of collaborative articulation agreements was acknowledged. University-college partnerships could result in better targeting and monitoring of developments, with sharing of knowledge, labour market information and good practice. However, there was considerable concern over emerging competition for students at HN level. University expansion at sub-degree level was affecting college recruitment. The point was made that HEIs need to be brought into the overall planning and collaboration framework. There is little point in rationalisation and collaboration between colleges if HEIs are free to compete in the same curriculum areas.

**Relationships with schools and education authorities**

Most comments on relationships with schools were related to Higher Still. Some schools and education authorities clearly wish to ensure that there are progression routes for students who have not benefited from an academically orientated school education, and through, the new National Qualifications, they want to work with colleges to provide a broader base of courses and awards. However, some colleges see schools as very autonomous, and wish to develop stronger links. There were some reports that schools were feeling threatened by college Higher Still activity. Some colleges suggested that a stronger steer from central government may encourage more local planning and co-ordination of National Qualifications provision.
Relationships with private training providers

Some colleges described relationships with private training providers as uneasy and difficult to build although a few described better relations with some providers than others. There was recognition of the high quality of the training delivered by some providers and cases where there was some justification for training providers undertaking work that could be done colleges, eg. in areas remote from college campuses. Training providers can often react faster to demand than colleges, but there was concern that ‘short termism’ was not always in the best interest of the trainees. It was frustrating to see loss of business though colleges’ longer commitment to clients’ interests.

Relationships with LECs

Relationships with LECs are least good of all those reported by colleges. LECs were said to see the relationship as contractual rather than collaborative. Although New Deal has promoted developments, the levels of bureaucracy made for difficult links. The LEC method of recording trainee progress by milestones/progress points fitted uneasily with the qualification structure, ie. unit/learning outcome methods used by colleges. Some LECs do not fund qualifications other than VQs. There is uncertainty over future funding as a result of changes in Scottish Enterprise and Highlands and Island Enterprise. In this context it was said that FE should be regarded as the preferred supplier of government-funded training.

Relationships with other colleges

Colleges made few comments on relationships with other colleges. They were usually described as improving, and sometimes as good and helping to provide a better-balanced service. They might benefit from some national organisation, but local ownership was important. A few colleges described a competitive environment, likely to remain so under current funding with a cap on the total pot of money.

Relationships with Community Education

Colleges welcomed the new Community Learning Strategies and said that links with Community Education need to be developed. Although it is not yet clear where the Community Learning Plans will ‘join-up’ services, colleges can add value to Community Education activities and open up progression routes from community education. A comment was made that relationships could be strained if FE was seen to be taking over in the community.

Other relationships

A few colleges commented on the ‘slowly improving’ relationships with employers, and efforts, sometimes with disappointing outcomes, to work with small and medium sized enterprises. An individual response was on the need for Careers
Services to be more active in FE and better prepared to help with adults.

Comments from respondents in national agencies generally reflected the view that collaboration was a good thing and would be essential in the future. There are other potential partners for colleges but the focus should be on making existing partnerships work better.

Most respondents in Glasgow acknowledged that collaborative mechanisms were in place and that what was needed was development related to strengthening existing links and moving beyond strategic issues to working at the operational level.

Respondents in Grampian were generally agreed that colleges had already made the links with key agencies. The issue now was to make those links work so as to more readily identify demand and provide a more comprehensive level of provision throughout the area. Community Planning and Community Learning Strategies were identified as potential mechanisms for developing partnership working. Consensus was also evident on the need to see the post-16 sector in a more holistic way and to view learning in its widest sense.

The responses from Careers Services and Adult Guidance Networks were very varied and were a reflection of experience and observation in their own areas. Examples of good practice and effective relationships were cited by most. However there were some reports of little dialogue and consultation. One respondent described envy by training providers of colleges’ privileged position (central funding, close links with the LEC). Areas noted by individual respondents for further development of relationships between colleges and other agencies were with libraries, the universities (over Wider Access provision) and the voluntary sector.

Enterprise and employment agency respondents generally felt that relationships with other providers worked reasonably well although tensions were identified by a few. One respondent noted that the college in their area had demonstrated a real willingness to work collaboratively with other colleges and to work with other local providers, both public and private.

**What other issues affect FE colleges’ ability to meet demands and needs for education and training?**

Colleges and representatives of all other agencies interviewed or surveyed responded to this question.

Comments related to funding and the funding regime were made by almost all college respondents. More funds, more stability in funding arrangements and a clearer, simpler relationship between planning and funding were required. Primarily these points related to the role of colleges in widening access and increasing participation, especially in addressing the Social Inclusion agenda. Recognition and
support was sought from SFEFC for the work of colleges in actively implementing key national initiatives. For example, there are significant increases in costs in developing the curriculum, teaching methods and guidance and support for excluded and disadvantaged people attempting to return to learning. Although many colleges, in line with a community-related mission, want to develop local learning centres/outreach provision, including childcare provision, this is costly, as is involvement in the UHI project, New Deal and some SME markets.

College respondents identified an increasing need for investment in new technologies, eg. digital technologies to meet the needs of modern industry. The costs of developing open and flexible learning using ICT provision is expensive and some experience so far suggests that although it can attract more students, there is no saving on costs. The case was made for continuing support for colleges’ work in meeting the needs of students with physical, sensory or other learning difficulties. Additional, ring fenced money is needed for renovation of existing facilities and for expansion of services.

The need for a realistic approach to supply of on-going capital and running expenses was emphasised in the context of being responsive and innovative rather than avoiding playing safe. Some college campuses are no longer ‘fit for purpose’. Space may not be used efficiently and ICT networks are not as developed as they need to be. Capital investment is routinely required to accommodate growth in student numbers and in expanding roles, especially in bringing college services closer to communities. Centres of excellence and entrepreneurism should be recognised and funded appropriately.

Of concern to many colleges was the relationship between the funding of HE and FE. There should be uniformity in funding across the same courses in the two sectors and the cap on HE in FE should be lifted. Issues of student funding were raised. Colleges had found that adult returners starting on basic, largely non-certificated courses wanted to take on a second year, in fully certificated courses, but they could not find funds. Especially for colleges with catchment areas with low participation and achievement, this restricts the potential of work to address Social Inclusion issues. Lack of recognition of uncertificated courses was also a barrier to addressing some specific needs of employers, especially those in small businesses.

Around a quarter of respondents wanted better market information and intelligence. A resolution of the long-standing issue of complex quality assurance requirements and over-audit of arrangements was also identified by many colleges, along with an unsatisfied need for recognition of student achievement in terms of personal goals as well as vocational achievements. In the words of one college ‘Social Inclusion issues often demand softer targets for success. The funding methodology should reflect “value added” criteria to allow the college to tackle deep-seated barriers to education in partnership with other agencies. The concept of “Social Venture Capital” may pump prime long-term solutions to entrenched problems of Social Inclusion and economic regeneration.’
A sizeable number of colleges commented on issues relating to staffing. These included the need to find ways to resource staff re-skilling, continuing professional development and updating in their vocational areas, and building staff confidence after recent major upheavals. Some needed new staffing to cope with increased student numbers.

Some colleges made the point that the achievements of FE were not sufficiently recognised, either by the rest of the education sector – schools and universities – or more generally. They identified a need for active promotion by the government and SFEFC of the role and value of FE and recognition of the uniqueness of the niches of different colleges.

The majority of respondents in national agencies mentioned a need to review the funding regime for FE and highlighted various areas such as the total resources available, the basis for distribution and how well the regime provided the proper incentives. Others reiterated issues, raised elsewhere, such as rural provision and collaboration. One respondent felt that capital stock would soon be a critical issue for FE.

The funding regime for FE was raised by all respondents in Glasgow as something requiring review. It was agreed that it ought to be changed so as to better suit the diverse needs and demands placed on FE colleges, and allow them to more effectively plan how and what education and training to supply. The fabric of FE buildings and estates was a recurrent theme among respondents, whilst others mentioned guidance, marketing, Education for Work, and collaboration as areas needing development.

The funding of FE, collaborative and partnership working, and articulation were the three main issues raised by respondents in Grampian. Some respondents were of the opinion that the current method of funding colleges inhibited the wider provision that would be needed and that the basis for allocation should shift to outcomes rather than inputs. Collaboration and partnerships were again raised as vital ways for colleges to take a pro-active role in the planning and delivery of education and training so that resources are maximised and needs met. A number of responses also indicated that there was a need to look at the post-16 sector as a whole in order to provide a coherent education framework which meets the needs of a variety of learners, both in accredited and non-accredited learning.

One respondent from Careers Services and Adult Guidance Networks succinctly identified geography, childcare and money as key factors. In rural areas it was inevitable that students had to move away from home to access further education. In both rural and urban areas, travel time and cost were barriers for many potential students, especially when combined with a need for childcare. Problems for their clients arising from benefit issues were reported by around a quarter of respondents. Colleges were said to be so financially constrained that they recruited in terms of numbers of students onto courses, regardless of jobs available. Lack
of agreement over the vision for FE appears to be hindering development in some areas. There were requests from many respondents for collation and dissemination of FE leaver destination statistics. This would assist long term planning in the sector as well as enhancing local marketing of courses.

Several respondents from the enterprise and employment agencies raised funding as an issue. Some did not offer any further comment but a few did highlight specific areas of concern. These included the need for greater coherence between government policy and funding mechanisms and constraints on capital expenditure. Others commented on the need for greater commercial awareness and more effective partnership working. Flexibility was mentioned, particularly in relation to furthering the Social Inclusion agenda.
Conclusions, recommendations and issues for further research

Introduction

The Further and Higher Education (Scotland) Act gave SFEFC a duty to secure adequate and efficient Further Education provision in Scotland.

In March 1999 the Government outlined priorities for development of Further Education provision in Scotland. A high priority for SFEFC outlined in these documents was to widen access and participation not only from groups currently represented but also to address the situation in certain areas of the country where there are fewer opportunities to access FE provision locally without travelling long distances. A second priority for the Council was to encourage and support the development of all forms of collaborative ventures between colleges which have demonstrable benefits for delivery of provision within the sector. The Government indicated that some rationalisation of the sector was overdue and it expected the Council to take a wide strategic view of the structure of the sector, regionally or nationally, in preparation for considering and advising on ways in which college based provision of further and higher education might be rationalised.

To fulfil the duties outlined above and respond to Government guidance, the Council needed to be well informed on the current adequacy of provision and options for change and development, in order to achieve a comprehensive network of institutions working together to ensure that the pattern of FE provision nationally best matches Scotland’s needs. The Scottish Office commissioned a report (Raab and Davidson, 1999) on the distribution of FE college provision and its accessibility. This study, commissioned by the Council, represents the next phase designed to begin to address issues of supply and demand. The review sought to determine the adequacy of current FE college provision. It aimed to map provision at college, regional and national level. It was intended to help identify any gaps in or duplication of provision. The review team were further required to make recommendations on development activity which may be appropriate to supply and demand in FE including the identification of areas where further research was needed.

This section sets out the conclusions and recommendations of the review, drawing on the findings from the wide range of strands of the research which are summarised in the preceding sections of this overview. In the conclusions we comment on current provision, gaps and changes in provision and collaboration amongst providers to assess the adequacy of FE college provision at national and regional level.
Conclusions

Current provision

The number of student enrolments on courses in Scotland’s 47 further education colleges has increased in the three year period from 1996 to 1999. The steepest increase over this period was in non-vocational courses. The numbers of men and women enrolling are approximately the same although mature students are most likely to be women. Subjects studied are heavily patterned by age and gender: IT is popular with older students; Science and Technology is predominantly studied by men; Care and Business are more likely to be studied by women. The increasing participation in FE is related to the wide range of locations for provision that colleges offer, not only on main campus sites but also in the communities and enterprises they serve.

Almost all colleges are currently providing flexible learning; over two thirds are providing on-line learning. Currently flexible learning is considerably more significant than on-line learning. Almost all colleges intend developing these forms of provision in the future. Most colleges are offering programmes for local, regional and national markets although there is considerable diversity in the numbers of students attracted from outwith local catchment areas. Two factors seem to be important in determining the extent to which colleges engage with regional and national markets. These are good transport links and provision which is specialist in nature and therefore not widely available throughout the country. This suggests that colleges are both responding to and stimulating demand.

National and regional agencies generally perceive colleges to be providing a very good range of programmes and qualifications which allow people to enter and progress at different levels. They judge that colleges are effective in meeting the needs of different student groups and that the student body is representative of the wider community. They also value the student-centred approach which aims to meet individual needs. While agencies recognised that colleges have made significant improvements in service provision, they are seeking further improvements: provision outwith the main college campuses and the standard college year is still seen as limited; there is unsatisfied demand for short, ‘taster’ courses and courses for continuing professional development; performance within and between colleges can be inconsistent and variable in quality; the interface between colleges and employers and employees should be stronger; and especially for younger, more disadvantaged students (especially males) there are concerns about retention and achievement rates. Improvements are also sought in the general standard of college premises, the childcare facilities, and the provision of student destination data. Agencies also identified a significant gap between people’s perceptions of colleges and the reality of their role and range of services.

Although the number of private training providers in Scotland far exceed the number of colleges their provision is much more specialised, focussed on VQ provision, and students numbers are much lower. National and regional agencies perceived them
to be more flexible and responsive but also commented that quality can be variable.

We have found that colleges, through their main campuses and the many other locations they use, provide a broad range of programmes and qualifications, which allow people entry and progression at different levels. In terms of overall effectiveness, the general thrust of feedback from respondents suggests that the improvements sought are for colleges to do more of, and in better ways, what they are already doing – or starting to do.

There are, however, significant regional variations in the profiles of current provision which suggests varying levels in some dimensions of adequacy for which we offer a few examples. In terms of student enrolments, our regional analyses found that in Lanarkshire and Grampian the proportion of enrolments in HNC/D and other HE courses is considerably higher than the national proportion whereas in Borders and Dumfries and Galloway the proportion of enrolments is considerably lower. Indeed Borders enrolments are 65% below the national proportion. For non-vocational courses the regions which have the highest proportion of enrolments are Dunbartonshire and Borders whereas Fife and Renfrewshire have the lowest proportion of such enrolments. Dunbartonshire’s enrolments are over 200% higher than the national figure. When we looked at student clusters we found that Highlands and Islands proportion of full time students is 34% higher than the national proportion; Ayrshire’s proportion of part time students is 38% higher than the national proportion; Grampian’s proportion of evening/weekend students is 63% higher than the national proportion; Lanarkshire’s proportion of distance/open learning students is 84% below the national proportion; and Dumfries and Galloway’s proportion of short, part-time students is 162% above the national proportion. The extent to which private providers contribute to regional provision also varies. For example there were 47 private training organisations with over 8,000 candidates in 1998/99 in Glasgow and no private providers in Borders.

**Gaps and changes in provision**

Analysis of the data at national level found evidence of gaps in provision. These gaps related either to provision which was not meeting total demand or to demand which was not being met at all. However the data relating to gaps should not be considered in isolation. There is, in fact, a correlation between the gaps identified and the areas of current and/or anticipated growth. There is also a reasonable degree of consistency between colleges and other agencies about gaps and changes in demand when data is aggregated at national level.

Colleges identified ICT covering a range of courses from basic word-processing to web design and e-commerce; Sport, Leisure and Recreation; Care; Business, Administration and Management; and Beauty Therapy/Hairdressing as programme areas, both full time and part time, which had been experiencing growth. Gaps where demand was not fully being met included ICT, Beauty Therapy, Sports Studies and Hospitality and Tourism. As well as these subject areas some
colleges also highlighted demand for work-based SVQs as outstripping supply. Other groups of respondents, for the most part, concurred with these.

Areas identified by particular colleges where there was no provision included aspects of ICT, e-commerce, Animal Care and Call Centre training. It was also noticeable that these gaps were discussed much more in terms of the mode of provision – particularly work-based, distance, part time and short course – and the level of provision – such as NC or SVQ. Again this was echoed by respondents in other groups. Finally, colleges anticipated growth in the areas already experiencing increases in demand and in areas where there is no supply at present. Anticipated growth from other groups of respondents included all of those identified by colleges and then, in some cases, this was extended. Some LECs also spoke of a need for a greater range of provision related to leisure activities as a hook to start people on the Lifelong Learning path. This was clearly more to do with supply stimulating, rather than responding to demand.

The evidence suggests that supply is and will continue to adjust to growing and emerging demand. Colleges should further develop this ability. One of the aims of SUfI is to make learners more discerning and more demanding. There is considerable potential and opportunity for the FE sector to work with SUfI in both stimulating and meeting this demand. What may be more problematic for the sector is in adjusting to decreasing demand. The evidence shows that this is not just about subject provision. Indeed it is, to a far greater extent, about traditional methods, modes and places of learning and this has important and far-reaching implications for the structure of college provision in the future.

Overall then, colleges are showing considerable success in understanding and responding to changes in demand. However, the aggregation of data masks both differences and similarities in the perspectives of colleges and users on gaps in provision and changing patterns of demand at regional level. In fact we found considerable variation in these perspectives within individual regions. Our regional analyses also showed that this is the level at which the data more usefully assists in informing developments in provision. For example, we highlighted above, regional variations in supply. What cannot be fully determined with the available data is the extent to which the regional pattern of supply is reflecting the needs of the region in terms of the local labour market, the population and the geography, or evidence of inflexible supply which is not appropriate to the range of needs.

Collaboration

Colleges have a wide range of interfaces: with employers and employees; schools and education authorities; higher education; and the community and community organisations. Working collaboratively and in partnership enables colleges to be proactive and to sustain and grow the range of services on offer. Colleges more strongly endorsed collaboration than formal partnerships. The comments about these suggest that the principle of partnerships is a vital one and that the framework had been developed. The imperative, expressed by both colleges and
other agencies, now was to move beyond the rhetoric of joined-up thinking and working and make it reality. Only then would partnerships add real value and become truly effective. The commitment to do this had to come from all the partners. One college pointed out that no other sector or organisation was being exhorted to consult and work with FE in the way that FE was being exhorted to consult with and work with everyone else. This issue of reciprocity is an important one in all of the interfaces between colleges and their partners.

The issues of collaboration, partnerships and the range of college interfaces cannot be disentangled from issues of location and distribution. Indeed, one respondent argued that these were already changing the structure of FE and we just hadn’t noticed it yet! The implications for the structure of FE, arising from changes in what is provided where, are only one part of the story. The need to stimulate demand, so as to comply with policy imperatives such as encouraging greater participation, widening access and reaching out to non-traditional learners are further variables which will have an impact. They can also bring about, rather than alleviate tensions.

One option for widening access is simply to significantly increase the number of places where learning and teaching can take place. This could lead to unnecessary duplication of provision and enhanced competition as more and more ‘satellites’ orbit around main campus sites. A proliferation of sites, specifically and exclusively owned and used by individual colleges, is one model of development in provision. At the opposite end of the continuum are mergers. Mergers, it was argued by some respondents, would sever the vital link between college and community and the perceived resource benefits from economies of scale were not yet fully proven. However, this should not be construed as an argument for preserving the status quo. A few colleges expressed support for rationalisation in terms of subjects, programmes and resources. Some developed this idea further into notions of joint portfolio planning by groups of colleges, and centres of excellence.

Rationalisation was also discussed in terms of post-compulsory education. The FE sector is only one part of this and other providers of education and training in the private, public and voluntary sector and the HEIs should be part of strategic planning. Similarly some rationalisation of tertiary education could be accompanied by harmonisation of the various funding streams for the providers of education and training. The final rationalisation issue which was raised related to the various ways in which quality is assured in colleges and other education and training providers.

Colleges considered that they were fulfilling their remit to make adequate provision but that their capacity to delivery adequate services can be constrained by external factors outwith their control. These often related to funding issues, and the need for greater coherency between funding mechanisms and policy imperatives was a persistent theme throughout the research.
Recommendations

This section makes recommendations on development activity related to supply and demand issues and identifies areas for further research.

The research indicates that almost all colleges have both a **local** and a **regional** role. This emerges from participation data, travel to study data, college responses, and agency responses. Some colleges also have a **national** role, and this is a major element for a number of colleges.

The **local role** is important in providing a responsive educational service to the local community. This is of particular importance for the widening access agenda. It can be enhanced in a number of ways:

- **Improved community-based provision**, which is very important in widening access, and in providing geographically accessible learning opportunities in dispersed rural areas. However this is at present patchy, being very good in some colleges/areas, but limited in others. Funding policy should be designed to encourage and support this provision.

- **Improved liaison with other educational providers in the local area** – this will include schools, Community Education and other agencies to ensure that there is an effective strategy to make the best use of the resources available. While there is evidence of this type of collaboration, it can usefully be enhanced, and established as a more central element of planning and provision.

The **regional role** is important both in ensuring that resources are used effectively, and in ensuring that the colleges respond to local and regional labour markets. While it is clear that many students chose to go to their local college, there is also evidence that many travel within regions, and to neighbouring regions to participate in the programme of their choice. If this regional role is to be developed in the most effective way there is a requirement for a higher level of joint planning and collaboration than currently takes place. Whilst almost all colleges report that they take part in a great deal of collaborative activity, there is little evidence of effective collaboration in the planning and delivery of programmes. Fife region seems to be the major exception in this respect, and there is evidence there, substantiated by the local agencies, of real co-operation to meet regional needs in an effective fashion.

This will require a higher level of co-operation, not just between colleges, but with other organisations such as LECs, universities, education authorities, schools and Community Education. While there is evidence of collaboration of this kind it is uneven and patchy.

Associated with this is the need to establish more effective ways of establishing local labour market needs. The research shows that there are often major differences in the assessment of need between agencies, such as LECs and Careers Services, and between agencies and the colleges. It is unclear which is
the more accurate or reliable as a guide to provision and indicates that more
effective collaboration in assessing needs and planning responses would be useful.
The new Labour Market Intelligence Unit being established by Scottish Enterprise
may be an important source of data for local planning groups.

All of this points to the need to establish stronger structures to encourage joint
planning and collaboration, not just between colleges, but with a range of other
educational providers, and other agencies.

Thought is also required as to how college strategic and operational planning and
funding mechanism can be used to encourage this type of collaborative activity so
that it becomes a central element.

There is evidence that workplace and work-based provision is patchy, and there is
a need to consider how this can be effectively encouraged and supported.
Provision of distance learning and on-line learning is also variable. This is a
particular issue in areas, such as the Highlands and Islands, with dispersed rural
communities. There is therefore a need to consider how funding policy can be used
to encourage and support more extensive provision of these types, particularly in
areas of key need.

The issue of whether college provision is sufficiently flexible is raised by many of
the agencies. Issues here are associated with flexibility in starting dates, provision
during the summer, and issues associated with outreach and on-line learning which
have been raised above. There are resource and planning implications associated
with introducing change of this kind which must be recognised and addressed if
real progress is to be made on a number of these issues.

In view of the foregoing, our recommendations are as follows:

- The current model of planning and delivery of programmes through self-
governing institutions working to meet the demands and needs of their particular
markets should continue to be the basis for ensuring adequacy of further
education college provision. However, this should be set in the context of
stronger arrangements for planning and collaboration at local, regional and
national level.

- The Council should work with the sector, groups of colleges, and individual
colleges to establish mechanisms for portfolio planning and delivery of provision
through groups of colleges working in concert and, where relevant, centres of
excellence. Groups may vary in their purpose and composition. A group may
be colleges within one region and related to the full range of the colleges’
portfolios, or related to selected subject areas where a group approach to
portfolio planning is judged to be particularly beneficial. A group may also be a
national group for specialised provision such as Agriculture, training for the
petrochemical industries and Veterinary Nursing offered by a small number of
colleges in the country as a whole. Joint portfolio planning should be
underpinned by effective links with stakeholders and other providers as
appropriate to the provision being planned. For example, provision related particularly to the Social Inclusion agenda and the needs of local communities could be planned in conjunction with the local authority, Social Inclusion Partnership and other local agencies; provision related particularly to the profile of skills needed in a region could be planning in conjunction with the LEC, local authorities, other providers and employers; provision related to skills where supply is available from a few specialised colleges could be planned in conjunction with national enterprise agencies, employers and other providers.

Joint portfolio planning at group level should aim to maximise the returns from the available funding through matching staff skills, accommodation and equipment to student needs. This should avoid duplication of provision where this is unnecessary, and aim to improve the range of learning opportunities available in the area served by the group. Where student numbers would not sustain dispersed provision this could be concentrated within one, or a number, of colleges within the group. For example all colleges in the group may offer FE level courses in a subject area, eg. Engineering, but only one or two may offer HNC/D provision in this subject area. The group as a whole, rather than the individual member colleges, could undertake a range of joint activities in the subject area(s) concerned, for example in market research, curriculum development, staff development and liaison with key users and stakeholders. Leadership and direction of the group may be the responsibility of key personnel from one or two colleges within the group. Aligned to this concept, a centre of excellence would be a node within the group where provision in the subject area(s) is most fully developed.

The exact nature of these groups and their modes of operation would vary from region to region. For example, in urban areas where there are several colleges, individual colleges can have more particular missions and portfolios whilst ensuring that the totality of provision across the area meets the full range of demands and needs. In contrast, in rural areas where there is a single college serving the needs of a wide geographical area, that institution will carry the responsibility for the totality of provision across a wide range of demands and needs.

- The planning of FE provision and issues of adequacy should be set in the wider context of post-compulsory education and training, both at national and regional level. Particular account should be taken of the provision which is jointly offered by colleges and the other sectors, for example, National Qualifications for 16-18 year olds offered by colleges and schools, Higher National Qualifications and their equivalents offered by colleges and HEIs, VQs offered by colleges and other training providers, and basic skills and community orientated courses offered by colleges and other agencies working in the community. At national level, this strategic planning should involve the two Funding Councils, appropriate departments in the Scottish Executive, and the Enterprise Agency network. A related issue is how best to harmonise the various funding streams available to the providers of post-compulsory education and training.
• It can be difficult for colleges to reconcile the need to maintain financial stability with the desire to commit resources to innovative development with uncertain returns. This can relate to provision in new subject areas; developments to enhance access to provision, such as community and work-based learning and flexible and on-line learning; and collaborative activity to enhance the planning and delivery of programmes. The Council, in consultation with colleges, should consider developing mechanisms to give further incentives to colleges to (a) generate new provision which responds to unmet social and economic needs and widens access, and (b) plan and deliver programmes in collaboration with other providers.

• The sector, working with partners, should implement a programme to highlight the distinctive role and value of Scotland’s FE colleges to individuals, communities and the economy. One aim should be to positively change the perceptions of particularly influential groups, such as education authority and school senior managers, HEI principals, and elected members on the value of the FE route.

• This review begins to lay a foundation of information to inform decisions at national, regional and college level to ensure the adequacy of FE provision throughout Scotland. The Council should continue to build on this data, to maintain its currency and extend its scope. One area for extension, for example, is comprehensive information on FE student destinations. The recommendations for further research which follow point up data which could be added to this baseline data.
Areas for further research

We recommend two key areas for further research. The first relates to a more comprehensive picture of supply and demand and the adequacy of FE provision. The second relates to greater insight into identifying and understanding need and therefore the appropriate responses.

- The Council should commission research to extend the baseline established by this review. In order to have a more comprehensive profile of supply, demand and need of FE college level at regional and national level further research would encompass a detailed analysis of the socio-economic characteristics and of all the provision post-16 up to and including year one and two of degree provision (or equivalent). This would include schools, HEIs, Community Education and the full range of other providers.

- The Council should commission further research into aspects of need for further education and training with particular emphasis on the following:
  - Long term trends and regional differences in the labour market, and their implications for education and training
  - Detailed information about unfilled and hard-to-fill vacancies
  - The education and training needs of part-time and flexible workers
  - The education and training needs of the 50+ age group
  - Barriers to participation.
Appendix 1: Project Team

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Alison Reid, Chief Executive, SFEU

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Gillian Raab, Professor of Applied Statistics, Napier University

Kirsteen Davidson, Lecturer, Napier University

Helen Storkey, Programmer, Napier University
Appendix 2 : Steering Committee Membership

Laurence Howells (Chair), SFEFC
Carol Calvert, SFEFC
Anne Grindley, SFEFC
Andy Hawkins, SFEFC
Iris Kirkpatrick, ASC
Dennis McCartney, Stevenson College – member of SFEFC’s Strategic Development Committee
Howard McKenzie, Motherwell College – member of SFEFC’s Strategic Development Committee
Caroline Stead, SFEFC
Appendix 3: Project Specification

Background

Remit of the Council

The Council was established on 1 January 1999 and took up its full range of functions from 1 July 1999. Article 4 of the Scottish Further Education Funding Council (Establishment) Scotland Order 1998 gives the Council responsibility for fulfilling the statutory duty in Section 1 (1) and (2) of the Further and Higher Education (Scotland) Act 1992, including a duty to "secure adequate and efficient further education provision in Scotland".

Government Guidance to the Council

In a letter of guidance to the Council from the Scottish Office (12 April 1999) and in its document, "Opportunities for Everyone - A Strategic Framework for Scottish Further Education" (March 1999), the Government outlined its current priorities for development of further education provision in Scotland. A high priority for the Council outlined in these documents is to widen access and participation, not only from groups currently under represented, but also to address the situation which occurs in certain areas of the country where there are fewer opportunities to access further education (FE) provision locally, without travelling long distances.

A second key priority for the Council is to encourage and support the development of all forms of collaborative ventures between colleges which have demonstrable benefits for the delivery of provision within the sector. The Government has indicated that some rationalisation of the FE sector is overdue, and it expects the Council to take a wide strategic view of the structure of the sector, regionally or nationally, in preparation for considering and advising on ways in which college based provision of further and higher education might be rationalised.

Council Response

To fulfil the duties outlined above and respond to government guidance, the Council needs to be well informed on the current adequacy of provision and options for change and development, in order to achieve a comprehensive network of institutions working together to ensure that the pattern of FE provision nationally best matches Scotland's needs. The Scottish Office commissioned a report by Gillian Raab and Kirsteen Davidson "The Distribution of Further Education Provision in Scotland" in March 1999 which reported on the accessibility of FE provision to the Scottish population, based on analysis of participation by postcode and association of postcode districts with centres of provision.

This review represents the next phase designed to begin to address issues of supply and demand, and to make recommendations on further developmental activity which may be appropriate to the supply and demand in Scottish Further
Education.

**Review Specification**

The Council has decided to instigate a thorough review to address systematically the current demand and supply of FE provision both in incorporated colleges and in Orkney College, Shetland College, Sabhal Mor Ostaig and Newbattle Abbey College. This is intended to help identify any gaps in, or duplication of, FE provision in Scotland. Tenders are invited for proposals which will assist the Council in its determination of ‘adequacy’ of provision through the mapping of current supply of FE and HE (as defined in the 1992 Act) by college (individually, in collaboration with other FE colleges or HE institutions and by franchising), by travel to study area, by region, at national level and at other levels of aggregation which the successful tenderer considers appropriate, such as by level of work or occupationally related indices. In addition the review should attempt to measure the level of demand which may exist at the equivalent levels of aggregation described above, as well as the level of need as identified by employers, community organisations and other relevant bodies. The review should also assess the role of private providers and skills training provision in meeting supply and demand.

**Existing Data Sources**

Incorporated colleges provide returns each year with information on:

- numbers by college, by postcode and by mode of attendance
- number of total enrolments, student retention and student achievements at programme level
- number of enrolments from students employed and released to attend college part-time
- number of employed students following open learning courses
- numbers attending programmes grouped by level (FE and HE) and by dominant programme group (Superclass 2)
- numbers enrolled by mode of attendance, postcode and by college

NB. Information from non-incorporated colleges is not available for all the above categories

Access would be given to the above data from 1994/5. The Raab and Davidson report and data are available at: http://www.maths.napier.ac.uk/~gillianr/feresearch/intro.html.

**Consultation**

It is expected that the consultants employed will visit representative colleges, local enterprise companies, Scottish Enterprise, Highlands and Islands Enterprise, local authorities, career guidance, educational guidance bodies, the Association of Scottish Colleges, Community Learning Scotland, COSHEP, SCVO, Social
Inclusion Partnerships and other appropriate organisations.

**Timetable and Project Management**

The project will be run under the direction of a small steering group who will hold an initial briefing with the successful tenderer. The review will be expected to be completed by the end of March 2000.

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1 In order to gather perspectives on issues of supply of and demand for FE in two contrasting regions interviews were held with senior people from agencies and organisations with an interest in, or involved in FE in Glasgow and Grampian. Grampian has two colleges, a relatively buoyant economy, and distinct city and rural areas. Glasgow has 10 colleges – some predominantly specialised and some multi-purpose. Whilst a major commercial and industrial centre, it has serious levels of deprivation and unemployment. Nine or 10 interviews were held in each region. The interviews covered the key strategic priorities for the FE sector, the current contribution of FE colleges, future areas of growth and decline in FE, and major policy issues which should be considered in order to strengthen FE provision. The report for each region briefly summarises findings in each area of the interview and includes an annex where responses are detailed.

2 In order to gather perspectives on national issues of supply of and demand for FE, interviews were held with senior people from 24 national agencies covering a wide spectrum of interests in FE. The interview schedule and report structure parallel the regional agency interviews.

3 The views of Careers Services and Adult Guidance Networks were sought on the adequacy of FE college provision in their areas. They were asked through a questionnaire to comment on current provision, future areas of growth or decline in demand, and issues affecting colleges’ ability to meet education and training demands and needs. The report briefly summarises findings in each area of the questionnaire and includes an annex where responses from each agency are detailed. The annex in particular contributes to an understanding of supply and demand of FE at regional level. However, responses from these agencies, while centred on a single region, usually also relate to provision in neighbouring regions and, in some cases, elsewhere in Scotland.

4 The views of LECs and Employment Service District Offices were sought on the adequacy of FE college provision in their area. They were asked through a questionnaire to comment on current provision, future areas of growth and decline in demand, and issues affecting colleges’ ability to meet education and training demands and needs. The report structure follows the format of the questionnaire. The annex to the report details responses by individual agencies and therefore contributes to an understanding of supply and demand of FE at regional level.