

**South West Region
WEA**

Annual Report

2007-8

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ANNUAL REPORT WEA SOUTH WEST REGION September 2008

The year end has seen the region achieve just over 100% of the LSC core funding target, which is a drop from the previous years over production of 103% and 108% the year before. The management team is acutely aware that any over production comes at a cost and we constantly strive to arrive exactly on target but you will appreciate that dealing with over 4000 learners, each generating some income, it is acutely difficult to be precise. We have in place this year new systems that enable Organisers from each geographical region across the South West to give presentations on planned provision as well as regularly track courses once provision has started. I hope you will agree that the region, particularly those who organize and support the delivery of provision, have been very efficient in utilizing this major source of income effectively.

Once again a lot of other providers are withdrawing from the markets that traditionally the WEA has operated in and as a result there is a lot of call for our services. We are unable to provide funding for all of these organisations and a future challenge is to balance this huge demand with our limited resources.

As ever budgets have been under pressure and people have operated at the very limits of their resources. I commend them on moving the region forward and responding so positively to these challenges. The main budget has been in deficit for some years now and as a result some major reductions in costs were needed and these have finally started to reap dividends. It is with pleasure therefore that we can record the South West region has returned a slight surplus for the first time ever.

We all recognize the dual imperatives of reaching a delivery target and balancing a budget but it has been much more difficult to reconcile these with the structural changes needed. The region has acquitted itself well on both these counts thanks to the strenuous efforts of staff and volunteers. I know that our operating conditions have been extremely hard but we have geared to meet the future and we should have some optimism moving forward.

Management Structure

The Regional Director leads a Regional Management Team (RMT), meeting formally monthly, although informally, a lot more often. This team is responsible for key decisions on policy and strategy for the region and for recommendations to Regional Committee. RMT consists of the full-time Regional Finance Manager, a full-time Curriculum Manager and a 0.5 FTE MIS/Administration manager, whose other 0.5 FTE is given to an Association role.

There are two further teams in the organisational structure, namely the Finance and Administration Group and the Quality Assurance Group.

Another third overarching team, The Learning Delivery Team, is composed of all tutor organisers and curriculum area leaders and meets around 5 times a year. It is responsible for bringing together the teams mentioned above and makes recommendations to RMT.

Overview of the Region

The South West Region works across six Local Learning and Skills Councils (LLSC's): Bournemouth, Poole and Dorset, Devon and Cornwall, Gloucestershire, Somerset, Swindon and Wiltshire, and West of England. The Regional Office is in Exeter, though course provision takes place across the Region, often in premises owned by other organisations.

For the year 2007-8 841 courses (951 in 2006-7) were delivered through the national contract with the Learning and Skills Council (LSC) with a total of 9867 enrolments (10755 the previous year). This represented a fall of 13% in the number of courses and 9% in the number of enrolments, over the previous year. Although this indicates a decline in overall figures we did reach the LSC target and the figures are really indicative of the greater efficiency we have in reaching the LSC funding target and the increase in fee remitted learners.

The profile of LSC funded regional courses in 2007-8, was:

Non-targeted provision, delivered through branches or open access

338 courses with 4618 enrolments (40.2% (39.5%) of courses; 46.8% (43.6%) of enrolments),

Targeted (including employer engagement) programme

503 courses with 5249 enrolments ((59.8% (60.5%) of courses; 53.2% (66.4%) of enrolments)

The figures in brackets indicate the previous year 2006-7. It is clear that there has been a minor shift in the balance of the courses over this last year towards non-targeted work and this is encouraging from a branch viewpoint.

The regional profile within WEA Curriculum Areas is given in the following table. Figures in brackets are last years.

WEA Curriculum Area	Percentage of Courses	Percentage of Enrolments
Visual, Performing Arts and Media	31 % (23.0%)	30.5% (24.0%)
Health Fitness and Personal Development	17.7 % (16.6%)	18.2% (18.0%)

Humanities, Languages and Literature	9.2 % (20.7%)	7.2 % (23.7%)
Foundation and Access Studies	15.4% (20.2%)	15.0 % (15.5%)
Environmental Studies and Science	10.20% (8.7%)	12.4% (8.9%)
Information and Communications Technology	14.9 % (4.8%)	14.8 % (4.2%)
Schools and Parenting	1.4% (3.4%)	1.3% (3.9%)
Others	0.2 % (2.6%)	0.6% (2.8%)

The Region successfully achieved slightly over 100% of its LSC cash target and showed an end-of-year main budget surplus in the order of £1k. ILR learner numbers reached 72% of the target. The fact that the cash target was slightly exceeded but learner numbers were down is again indicative of a large increase in the numbers of full fee remitted learners. Skills for Life learners achieving national qualifications reached 89% of target. The Observation of teaching and learning target for the year was not almost met. It was originally a target of 200, reduced in-year to 120 and finished at 110 actual observations.

The proportion of the programme being delivered through the Branches, i.e. open access and not targeted at particular groups showed a slight increase after a significant fall in the previous year. The targeted provision including Employer Engagement and SfL is usually delivered in partnership with other organizations and this work has remained pretty stable. Curriculum priorities have been to develop and expand quality systems which is evidenced in not only a successful external inspection but followed up by an independent review of the South West region that confirmed the good standards.

The Regional Office in Exeter houses the Regional Director, Administration and Finance staff. The Regional Office provides support to field staff, giving access to management information, regular meetings and updates etc. Staff use the Regional Office for storage of equipment and resources and additionally most have local support for managing teaching resources. Some teaching activity takes place at the Regional Office. The Region does not have teaching centres of its own but relies on branches and partners to provide venues.

The 42 branches across the Region form the base of the voluntary infrastructure at local level, and Federations or Area Forums draw branches together in each county. Key roles include delivery of non-targeted courses and running of the branch. Voluntary activists in the Region are recruited primarily from the cultural studies programme student body.

At the time of writing the Region has just received notification of success on a bid for around £10,000 submitted to the Big Lottery Fund under the heading "Volunteer Revival".

This aims to revitalize the voluntary movement through an active support programme. This work across a number of fronts includes publicity and training and is an ambitious project. A positive outcome for this bid means we can now focus on trying to bolster the number of volunteers across the region.

The accountable body of the Region is the Regional Committee which delegates some powers to its sub-committees (the Education Committee and the Finance Committee). Members of these committees are elected according to constitutional requirements at the AGM. The agenda of the Education Committee is discussion of educational policy and developments, and the monitoring of related targets. The Finance Committee carries out scrutiny of regional management and financial accounts.

The new Regional Committee was formed after the AGM in November 2007 and has been operating throughout the year. The Officers, NEC Representatives and the members have been very supportive and helpful and I would wish to record my personal thanks to them, not only for their support, but for their sheer hard work and tenacity in seeing the business through.

Staffing

All of our full time organisers are either Curriculum Area leaders or have commensurate responsibilities. At the start of 2006-7 there were 13 organiser staff (9.1 FTEs), some based at home. At the end of the academic year 2007-8 this has been reduced to 10 staff (7 FTE) in response to budgetary pressures. In addition there are 4 staff (3.0 FTE) with a cross regional role. These roles cover ITLT, Professional Development, Skills for Life and Workplace. A Regional Office Team in Exeter of 10 posts (7.2 FTEs) supports the educational programme, governance and financial operations and 7 posts (4.7 FTE) support these functions elsewhere across the region.

In summary we continue to make changes to our educational planning and quality assurance systems to respond to demanding LSC targets and the communities we support. We have driven up quality standards considerably as evidenced by both Ofsted inspectorate and external review. Fiscally the Region is finally achieving a relatively stable position and has a workforce adequately equipped to move us forward.

Steven Martin,

Regional Director

Quality Assurance

The 07-08 academic year has been a busy one in terms of the Region being monitored. We had the full OFSTED Inspection in March and an Internal Review conducted by an external consultant. The Association inspection went very well indeed with only the Foundation CMA being judged satisfactory and all other areas including Leadership and management above this!. The Internal Review entailed a process of testing whether the SW Region stood up to the recent OFSTED inspection judgments of quality. I am pleased to report that we passed this with flying colours and that the region should be very satisfied with its QA position. The final round of inspection and review was the Specially Designated Institutions (SDI) review, the WEA being an SDI. This is a process that is being undertaken nationally, with all WEA regions contributing to the final report, together with 27 other institutions, both SDI's and FE Colleges. It is worth noting that the reviewer was very impressed with our wide ranging courses and the real impact we have on communities and individuals.

The **Quality Assurance Group (QAG)** has been restructured this year with a new membership and a new remit statement. The group has a standing agenda taken directly from the WEA Association Quality manual. Some of the undertakings of the group are as follows:

- To regularly sample Observation of teaching and learning (OTL) reports by observer and by curriculum area
- To receive and monitor OTL actions by Organiser area
- Receive reports from External Verifiers (EV's)
- To regularly monitor success rates
- To receive Information, Advice and Guidance (IAG) issues and monitor progress towards Matrix accreditation.
- To receive and monitor stakeholder feedback
- To receive Tutor Organiser (TO) annual reports as well as annual Curriculum Area Leaders (CAL) reports. The subsequent regional Self Assessment Report (SAR) is received by the group.

The **Observation of Teaching and Learning** process has been re organised and has proved successful in this first year by hitting OTL targets and ensuring the OTL reports were provided to every TO and CAL once completed. TO's would then work with individual tutors where OTL actions had been identified. This information would then feed into Annual TO reports, CAL reports and ultimately the SW regional SAR.

The information in the first part of the table below shows the volume of observation by Curriculum area in relation to the volume of courses within that same area. The indication is that we have sufficient observations in each area to be sure of our quality judgments. The data in the second part of the table shows volume of observations by individuals as well as grades awarded. This will enable QAG to monitor individual performance and grading as well as observer usage.

SW OTL by Curriculum Area 07/08			Grades				Comments
Curriculum Area	Learner hrs as of June 08 LMR	Approx % of overall SW offer	1	2	3	4	
ESS	28,000	15%	1	4	2		7% as to 15% of offer
Found	20,000	11%	1	16	3		20% observations as to 11%
HFPD	38,400	20%	1	6	5		12% as to 20% of offer
HLLSS	45,600	23%	1	21	10	1	Too many observations (32%) for volume of provision 23%
ICT	8,600	4%		4			Combined areas are approx 9% of provision with 13% of observations undertaken in these areas
Prof	5,600	3%	1	5	1		
P&S	4,100	2%		1	1		
TUL	0	0		1			Course not yet on LMR?
VPAM	55,800	28%	2	7	2		Too few observations (11%) for volume of provision 28%
Paired Observations					3		

SW OTL by observer 07/08		Grades			
Observer	No of OTL's	1	2	3	4
Andrea Stevens					
Sally Anne Parker					
Lesley Morton	2		2		
Aydin Boyacigglier	9		8	1	
Frank Gent					
Rosemary Cave	5		4	1	
Elissa Hamilton	7		3	4	
Roger Parnell	10		7	3	
Glenys Smith	12	1	8	3	
Helen Garvey	4			4	
Mick Atkinson	2	1	1		
Angela Jones	3	1	2		
Christine Mottram	7		4	3	
Vanessa Glasgow					
John Kirkaldy	4	2	1	1	
Chris Collier	2		1	1	
Deb Hastings	4		4		
Chris Waters					
Ewa Mahey					
Jane Boothman	2			1	1
Barry Mole	4	1	2	1	
J Howard-Graves					
Jo Stitchbury	1		1		
Josie Brown	1		1		
Wendy Daniels	5		5		
John Moon	3		2	1	
David Scholar					
Liz Merry	5	1	3	1	
Lynne Mason	1			1	
Debbie Hill	1			1	
Viv Thomas	6		4	2	
TOTAL OTL's	100	7	63	27	1
% OTL		7%	63%	27%	1%

As part of the OTL remit tutors in Foundation and Professional CMA's will be observed each year whilst all other tutors every 2 years. New observation logging and recording systems enable the easy tracking of this and the aiding of OTL planning for each academic year. Also as part of this observation process any tutor can be targeted to be seen for any of the following reasons:

- Poor student feedback
- Poor success rates
- Complaints being made by partner organisations
- Poor EV reports

The Recognising And Recording of Progress and Achievement (RARPA) is embedded but still needs attention and focus by tutors. This will be managed and monitored by individual TO's as well as the Regional Curriculum Manager with forms and registers regularly monitored in Exeter.

Stakeholder Feedback has been the subject of attention this year with random sampling of "Tell us about it" (the feedback form from learners) and also we have written to our partner organisations requesting information on the quality of our service to them.

All in all the new systems implemented this year are now working well and will soon become second nature to all involved and will provide a good sound structure for us all to monitor and manage the quality of our provision.

John Young

Provision and Learner Participation (LSC Main Contract)

A total of 841 courses were run in the Region during the year (main LSC contract)). This represented a reduction of 13% on the previous year. The total course hours offered decreased by 28% from the previous year to a total of 19,587 hours, as the average course length decreased from 26.14 hours to 23.29 hours.

The total enrolments also decreased by 9% to 9,867 with average class size of 11.73 learners increasing from 11.2 for the previous year. A main reason for the reduction in courses and enrolments was the significant increase in fee remitted learners. The relatively higher level of funding recovered by these learners meant that the overall allocation was not able to support as much provision as the previous year. The average retention rate for all completed courses increased from 94.6% to 95.72%.

Regional Provision Summary (LSC Contract)

Regional	Academic Year		
	2005/06	2006/07	2007/08
Number of Courses	1,323	969	841
Course Hours	32,565	25,327	19,587
Enrolments Recorded	14,599	10,848	9,867
Withdrawals	852	586	422
% Withdrawals	5.84%	5.40%	4.28%
Learner Enrolment Hours	350,166	281,401	220,289
Average Enrolments	11.03	11.20	11.73
Average Course Hours	24.61	26.14	23.29
% ILR income from fee Remitted learners	54.8%	62.8%	71.0%

Courses by Local Authority

Courses	Academic Year		
	2005/06	2006/07	2007/08
Local Authority			
Bath and North East Somerset LEA	11	12	7
Bournemouth LEA	6	7	2
Bristol LEA	239	224	167
Cornwall LEA	94	55	55
Devon LEA	196	119	75
Dorset LEA	53	43	40
Gloucestershire LEA	92	104	39
North Somerset LEA	58	62	48
Plymouth LEA	352	182	249
Somerset LEA	52	38	38
South Gloucestershire LEA	5	1	2
Swindon LEA	54	47	30
Torbay LEA	12	16	32
Wiltshire LEA	99	58	57
Grand Total	1,323	968	841

Learner Enrolment Hours by SW Region Local Authorities

Learner Enrolment Hours Local Authority	Academic Year		
	2005/06	2006/07	2007/08
Bath and North East Somerset LEA	2,629	2,818	1,928
Bournemouth LEA	962	1,438	210
Bristol LEA	51,382	50,502	43,375
Cornwall LEA	30,971	17,238	13,046
Devon LEA	66,365	36,734	30,005
Dorset LEA	11,084	9,763	9,588
Gloucestershire LEA	21,552	21,473	8,313
North Somerset LEA	20,371	23,322	20,410
Plymouth LEA	98,501	86,885	63,390
Somerset LEA	12,540	6,347	7,838
South Gloucestershire LEA	597	112	238
Swindon LEA	8,173	7,474	3,789
Torbay LEA	5,600	5,072	6,310
Wiltshire LEA	19,439	12,155	11,849
Grand Total	350,166	281,331	220,289

Learner Enrolment Hours by Subject

Subject	2006/07	2007/08
Crafts, Creative Arts and Design	48,531	56,742
Creative Writing	3,459	5,159
Nursing and Subjects and Vocations Allied to Medic	669	998
Horticulture and Forestry	22,697	16,168
Health and Social Care	49,532	22,709
Geography	616	198
History	16,109	11,110
Science	6,012	3,449
Archaeology and Archaeological Sciences	1,346	1,729
Languages, Literature and Culture of the British I	10,306	8,816
Other Languages, Literature and Culture	14,361	16,864
Performing Arts	5,620	4,655
Sport, Leisure and Recreation	12,804	9,679
Philosophy	915	216
Environmental Conservation	3,287	6,972
ICT for Users	18,923	10,900
Theology and Religious Studies	546	90
Media and Communication	347	240
Child Development and Well Being	6,588	2,422
Hospitality and Catering	6,465	8,410
ESOL	26,978	15,505
Building and Construction	3,873	3,597
Literacy	2,944	804
Politics	470	0
Teaching and Lecturing	5,748	3,888

Numeracy	3,005	2,495
Preparation for Work	280	377
Skills for Volunteers	5,296	1,668
Trade Union Studies activist programme	990	0
Animal Care and Veterinary Science	3,220	0
Linguistics	0	600
Public Services	120	0
ICT Practitioners	0	168
Skills for Independent Living	7,432	3,436
Sociology and Social Policy	361	81
Accounting and Finance	0	144
Law and Legal Services	2,146	0
Grand Total	291,994	220,289

Participation Trends

Data	Courses Finishing In			
	2004/05	2005/06	2006/07	2007/08
% Enrolments (Female)	71.8%	70.1%	69.4%	72.4%
% Enrolments (Male)	28.2%	29.9%	30.6%	27.6%
% Enrolments (Physical Disability)	12.3%	15.0%	15.5%	18.1%
% Enrolments (Learning Disability)	7.4%	8.9%	10.1%	13.0%
% of All Enrolments with Ethnicity Known	89.9%	88.2%	87.9%	91.1%
% Enrolments (Declared Ethnic Minority)	3.8%	6.7%	8.1%	7.7%
% Enrolments (Postcode Uplift)	15.0%	21.1%	21.7%	21.5%
% Enrolments (Fee Remitted for financial reasons)	24.7%	30.5%	35.4%	50.2%
% of All Enrolments with Qual Status Known	62.6%	60.8%	61.3%	67.0%
% Enrolments (Below L2)	28.5%	31.8%	34.1%	40.2%
% Enrolments (L2 & Higher)	71.5%	68.2%	65.9%	59.8%
% of All Enrolments with Age Known & Valid	94.8%	96.1%	95.6%	96.5%
% Enrolments (16-18)	1.2%	1.2%	1.7%	0.7%
% Enrolments (19-24)	4.1%	6.9%	7.2%	4.6%
% Enrolments (25-64)	63.1%	64.5%	63.6%	65.0%
% Enrolments (65 & Over)	31.5%	27.3%	27.5%	29.7%

Learner participation trends show continued steady increases in the proportion of enrolments from: learners with physical and learning disabilities, fee remitted learners and those with previous qualifications below level 2.

Use of Learner Support Funds (LSF)

Subject Area	Data	Totals
Health and Social Care	Number of Claims Approved	72
	LSF Costs Approved	£10,709
Performing Arts	Number of Claims Approved	3
	LSF Costs Approved	£215
Crafts, Creative Arts and Design	Number of Claims Approved	101
	LSF Costs Approved	£4,941
ICT for Users	Number of Claims Approved	9
	LSF Costs Approved	£917
Languages, Literature and Culture of the British	Number of Claims Approved	2
	LSF Costs Approved	£51
Creative Writing	Number of Claims Approved	20
	LSF Costs Approved	£994
Horticulture and Forestry	Number of Claims Approved	11
	LSF Costs Approved	£1,205
Teaching and Lecturing	Number of Claims Approved	21
	LSF Costs Approved	£1,599
Other Languages, Literature and Culture	Number of Claims Approved	44
	LSF Costs Approved	£3,117
History	Number of Claims Approved	2
	LSF Costs Approved	£72
Nursing & Subjects and Vocations Allied to medicine	Number of Claims Approved	1
	LSF Costs Approved	£37
Child Development and Well Being	Number of Claims Approved	1
	LSF Costs Approved	£165
Sport, Leisure and Recreation	Number of Claims Approved	6
	LSF Costs Approved	£698
Philosophy	Number of Claims Approved	1
	LSF Costs Approved	£30
ESOL	Number of Claims Approved	151
	LSF Costs Approved	£12,020
Skills for Independent Living	Number of Claims Approved	27
	LSF Costs Approved	£520
Building and Construction	Number of Claims Approved	9
	LSF Costs Approved	£886
Science	Number of Claims Approved	2
	LSF Costs Approved	£60
Numeracy	Number of Claims Approved	3
	LSF Costs Approved	£240
Preparation for Work	Number of Claims Approved	2
	LSF Costs Approved	£48
Linguistics	Number of Claims Approved	7
	LSF Costs Approved	£865
Total Number of Claims Approved		495
Total LSF Costs Approved		£39,388

Learner Support Fund Type

LSF type	Data	Total
Childcare support fund	Number of Claims Approved	6
	LSF Costs Approved	£1,831
ESOL hardship fund	Number of Claims Approved	156
	LSF Costs Approved	£12,308
General support fund	Number of Claims Approved	333
	LSF Costs Approved	£25,249
Total Number of Claims Approved		495
Total LSF Costs Approved		£39,388

Use of Additional Learner Support (ALS)

Subject Area	Cost of Support Provided
Crafts, Creative Arts and Design	£46,165
ICT for Users	£235
Horticulture and Forestry	£7,233
Health and Social Care	£1,650
ESOL	£1,608
Skills for Independent Living	£16,012
Teaching and Lecturing	£3,657
Literacy	£143
Numeracy	£786
Linguistics	£269
Environmental Conservation	£2,004
Grand Total	£79,763

LSC Income for the Region was £1,829,016 which was a reduction of £75,608 on the previous year. The average total income generated per course hour (ILR income + tuition fee income) increased from £79.38 in 2006/07 to £100.58 in 2007/08. The average total income per learner hour increased from £7.36 in 2006/07 to £8.91 in 2008/09. These increases were mainly due to the increase in average class size and in the number of fee remitted learners.

David Kay

MIS Manager

Regional Finance Report

The provisional results for the Region (including Branch income and expenditure) show a surplus of £210 for 2007/8 (2006/7 £114k deficit) against a forecast budget of £16k deficit. The budget deficit was enhanced by £80k of Other Grants that were shown to improve the true budget figure of £96k deficit. The Region achieved 100% of its learning targets although course hours delivered fell from 27,800 in 2006/7 to 21,200 in 2007/8 and this had a significant effect on costs. This excellent result for the year was achieved by strict control of expenditure and learning outputs. Our delivery programme has been closely monitored to ensure we maximised our income, delivered the most cost effective courses and did not exceed our LSC target.

Income was £93k below budget principally due to low tuition fee income (£23k adverse) and Other Grants (£78k adverse as mentioned above). Other income included £10k from Branches offset by a charge of £10k from Corporate Services in respect of the Bristol Office rent.

Direct costs were £119k less than budget largely due to savings on Tutor costs (£131k favourable) due to the reduction in course hours delivered. The adverse variation of £21k in Learning Support costs was entirely due to Branch costs which were not budgeted. Overall the Branches returned a surplus of £662.

Overheads exceeded budget by £10k. The apparent saving of £9k on Accommodation Costs was due to charging the Bristol office rent of £10k to Other Income (see above). The major adverse variations arose from costs not budgeted. These were publicity costs that included £4k of Branch costs and Revenue Equipment costs which included £15k relating to a NIACE Capital Grant of a similar amount. Costs continue to be strictly controlled. In comparison to the year 2004/05 when the Region achieved only 80% of its learning targets, staffing costs and overhead costs have been reduced by 5% and 10% respectively.

Our fee collection procedures ensure we recover all monies due and monthly reporting deadlines have been further improved. The detailed monthly reporting by cost centre has enabled us to successfully monitor individual segments against budget and planned delivery. Further training is required to ensure cost centre managers derive full benefit from the cost and income analysis they receive.

The budget forecast for 2008/9 shows a deficit of £50k but for this year does not include any speculative income in order to present a more favourable position. Income shows a small increase over 2007/8 in line with the LSC's fee element expectations but Other Grants continue at a relatively low level.

Costs show 4% increase over actual costs in 2007/8 but if the trend in course hours delivered is maintained this will result in a significant reduction in tutor costs. If the policies followed in 2007/8 are continued and the trends established in that period are maintained it is expected that the Region will at least achieve another break-even position in 2008/9.

Chris Davis, Finance Manager