



2016

Annual Report



HOLEX 2016 Annual Report and Impact Statement Including Members Views

Foreword

This report describes the work of HOLEX and what was achieved in 2016 and provides an insight into what members thought of our service. During 2016 the membership increased and feedback from members and partners has been very positive, with people very much appreciating the service offer.

I would like to thank you for your support. It is wonderful to Chair an organisation where the members are keen to support each other. This is what makes the way we operate unique and brings its own energy. The spirit of collaboration is what sets us apart and makes us responsive to each other's issues and queries. So, thank you for being generous with your time in answering questions for other colleagues.

Many of you think the service has improved over the last 12 months, particularly noting 'the more structured' communication and 'greater sense of pace and purpose' together with good value for money. Therefore, it is our intention going forward into 2017 to continue to focus on the 10 service areas of:

- 1 Policy contribution
- 2 Representation
- 3 Policy interpretation, analysis and advice
- 4 Newsletters and Round Ups
- 5 Postbox
- 6 Case work
- 7 Network development events
- 8 Facilitating peer support
- 9 Managing externally funded development projects
- 10 Sharing knowledge/learning

Priority Areas 2017

In 2017 we wish to build on the good work achieved in 2016, focussing on the service areas listed above and on the key policy changes which will have the greatest impact on HOLEX members.

During 2017 our representation and policy effort will be focussed on the following:

1. Determining and undertaking effective representation to the Treasury and DfE on the value of adult education and in doing so making sure that our ESF is not lost during the Brexit negotiations.

2. Preparing one set of members for Devolution and others for SFA dual running.
3. Working with SFA to ensure the integration of the Community Learning budget into the Adult Education budget is smooth and supports the fundamental principles of adult education.
4. Supporting members on quality and helping member organisations move from Ofsted 'Good' to 'Outstanding' where necessary.
5. Influencing the apprenticeship reform programme, with a special interest in the most vulnerable persons having access to an apprenticeship.
6. Working with DfE to ensure SEND good practice is identified and shared.
7. Helping to establish an adult career service and supporting the Minister's concepts.
8. Working with ETF and AoC to ensure there is a leadership and governance CPD offer that matches providers' needs.
9. Determining and sharing best practice, implementation structures and governance models.
10. Working with AELP on determining and sharing best equality and diversity practice in recruiting and supporting apprenticeships.
11. Supporting members on delivering English, Maths and ESOL.
12. Helping to establish a digital adult education strategy and the required continual professional development for staff.

The next year is undoubtedly going to bring new issues and problems but alongside that, as ever, will be real opportunities and we hope that we can help and support you in all of these.

Best wishes

Barbara

Barbara Holm

Chair of HOLEX

2016 Annual Report and Impact Statement

Including Members Views

HOLEX is the lead body for Adult Community Education and Learning

HOLEX represents a network of 120+ adult and community learning providers and is the sector membership body for Local Authority Community Learning (ACL) services, Specialist Designated Institutions (SDI), and independent third sector providers. HOLEX members have the largest geographical reach of all providers and they educate, train and retrain 700,000+ adult learners annually. They are judged by Ofsted as the sector best for adult overall performance and top of the league table for customer satisfaction.

All our members share a joint mission to provide skills and learning that gives adults a second chance, supports their employment prospects and wellbeing, which in turn improves productivity and creates the circumstances for economic success.

HOLEX Purpose:

HOLEX exists to help further develop adult learning providers' capacity to provide high quality, cost-effective adult learning opportunities within a publicly funded context. It supports and promotes the role of its member organisations in extending and widening participation, especially by adults who have not previously benefited from education and training and those who want enrich their life through learning a new skill. To ensure we are providing the service they require we conducted a member survey and the following describes what we have accomplished and what our members had to say.

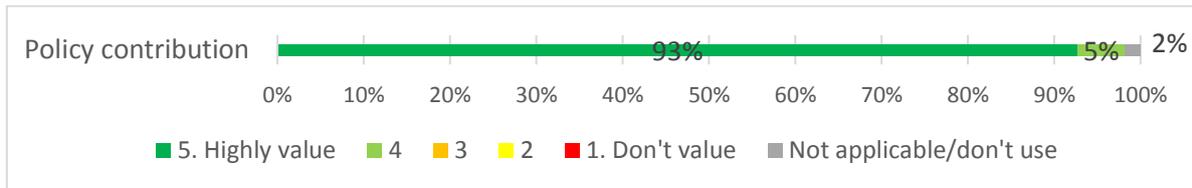
2016 Services and Members' Feedback:

Throughout 2016 we provided HOLEX members with the following services:

1. Policy contribution

In 2016 we were proactive in ensuring we could contribute to new government policy initiatives through contacting and working with key civil servants, policy influencers and funding agency leads. This work has had impact, facilitated change of policy and has been successful in raising the profile of adult education and skills. In the last year, we have helped protect community learning (CL) funding for 2017, shaped devolution agreements, contributed to the skills plan and the Minister's new work on careers, lifetime learning, loans reform and the apprenticeship programme development including voicing the concerns of apprentices.

Our members noted this to be a ‘key area,’ offering ‘excellent’ service and support with an appreciation of the ‘level of knowledge and engagement provided.’



Members’ Feedback

“Extremely valuable representation and lobbying on behalf of ACL in Area Reviews.”

“We need one well informed go to service which the government and other organisations can be confident represent the sector as a whole and Horex provides that.”

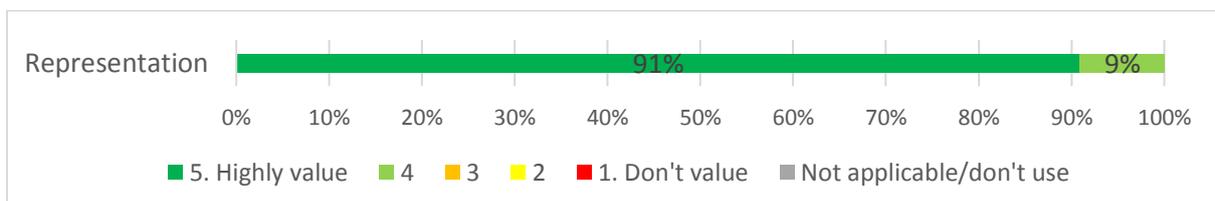
2. Representation

A core purpose of the HOLEX Network is to make representations to the Government and to the agencies that manage the funding, qualification and inspection landscape. In 2016 HOLEX became a recognised part of the Government’s consultation machinery and there are HOLEX members on national groups convened by BIS, SFA and EFA. HOLEX has made representation to the Treasury on the March budget and Autumn Statement and in doing so has developed a bank of material that supports the rationale for investing in Adult Education.

The HOLEX Policy Director also has regular “keep in touch” meetings with Ministers, Shadow Ministers, relevant members of the House of Lords, senior civil servants, Funding Agencies, key policy agencies like the Resolution Group and Learning and Work and with Ofsted. HOLEX is now seen as one of the first places to go for sector advice and has contributed to the guidance on area reviews, student voice, proposed funding changes related to localism and outcome payments, and careers and apprenticeship reform. In many instances, our representation on these issues have changed the final guidance and/or policy.

AAETO/HOLEX is one of the “founders” of the Education and Training Foundation (ETF) and nominates a senior leader from HOLEX onto the ETF Board. This work has allowed us to influence the strategic direction of ETF, ensuring that the CTP needs of CL staff are fully understood.

Members appreciated the collective voice offered by HOLEX and the representation to other bodies.



Members' feedback:

"A core function of HOLEX is to have a collective view expressed where it matters."

"Connected-ness of HOLEX to key external agencies has always been good and is even better now".

"Holex provides collective advocacy which, always important, is now even more so given the potential changes to ACL policy and funding."

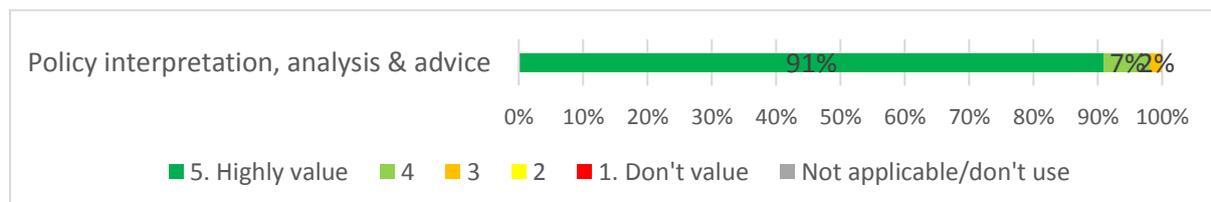
"This has been excellent this year."

"Very important for the sector to keep a high profile and feed into/influence these national groups."

3. Policy interpretation, analysis and advice

In 2016 HOLEX generated over 50 policy summaries and analysis of current government policy announcements and initiatives, including mapping out the impact on providers and members, and providing an indication of what further action needs to take place to ensure smooth implementation.

HOLEX members described this as 'particularly helpful,' 'incredibly useful' and 'invaluable.' *Note that the feedback/responses in this area seem to particularly relate to the Policy Round Ups.*



Members' Feedback:

"It can be difficult to find the time to digest everything. The Director's concise summaries are very helpful and must be saving 100's of hours nationally!"

"The policy updates are hugely important - I particularly like the 'what you need to do' bit."

"The updates are fantastic - really clear, informative and excellent advice on action required."

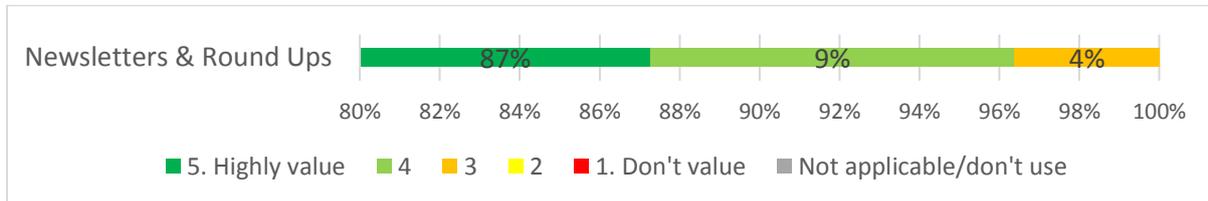
"These are brilliant, very useful and sometimes save us time in condensing what we need to communicate to others within the council, elected members, staff etc. Keep these coming."

"Very important when we are always likely to miss something key because we are focused on local issues - national issues impact as well."

4. Newsletters and Round Ups

We provide fortnightly policy round ups which cover new policy initiatives and give members an idea of what action they need to take.

This area was described as 'invaluable,' 'extremely useful' (twice) and 'succinct.' Respondents really appreciate the policy summaries and see them as saving them a huge amount of time.



Members' Feedback:

"Highly valued is the concise summary, digestible and understandable!!!"

"This is the real strength of HOLEX, providing an invaluable 'take' on the latest developments regarding funding etc."

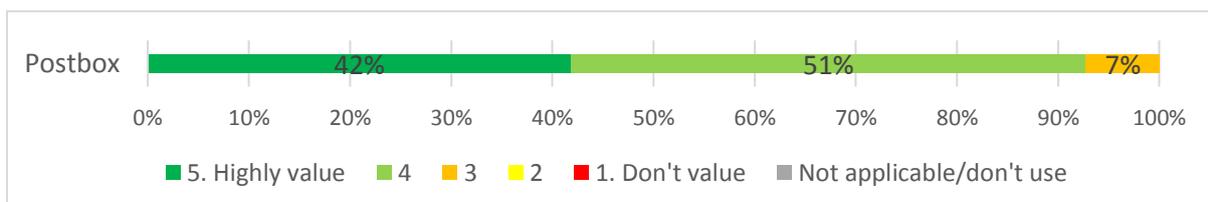
"With all the changes in the sector, it is brilliant to get a succinct summary of all the policy documents and the actions to take without having to read through everything."

"Policy updates and recommended actions under them are invaluable in keeping abreast of developments."

5. Postbox

HOLEX provide a service to other organisations (such as ETF) who need to let HOLEX members know of new initiatives, training opportunities etc. and act as a filter where necessary. Last year we sent out over 300 communications that alerted members to training opportunities and staff vacancies.

A slightly lower percentage of members rated this as highly valued, but 93% overall rated it as either '5' or '4'. However, partners find it really useful and it does provide an effective conduit to the sector.



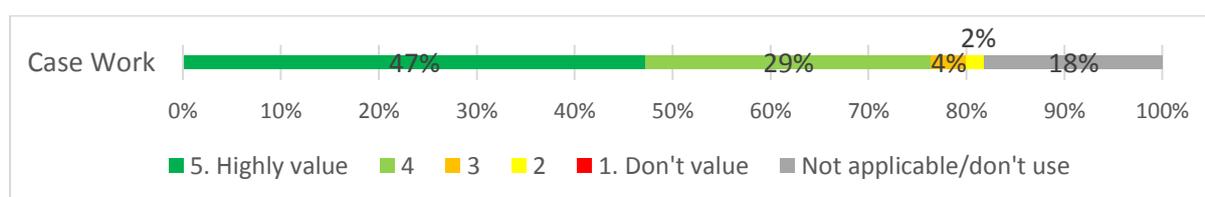
Members' Feedback

"Reduces chances of missing important developments - very efficient to have this channel of communication."

6. Case Work

The HOLEX Director of Policy has responded to individual service and/or centre issues and been able to provide advice that has directly supported services in resolving these issues, or has been able to take them up with the appropriate agency - for example, SFA or Ofsted if necessary. Most of the issues have related to SFA contracts, contract novation, interpretation of funding rules, mis-communications, eligibility over loans, staff salaries and conditions of service and devolution assumptions.

The general feeling from members is that this a useful service when circumstances require support, but most were unaware of it and had not looked to HOLEX for this type of support. Those who have used this service see it as a life saver and somewhere to discuss their most difficult issues.



Members' Feedback:

“Have not used but would not hesitate to if required as we highly value the level of expertise within Holey.”

“Haven't been involved in this but we can all learn from each other's issues. Perhaps more scope to share this learning if appropriate to wider ACL community.”

“I haven't made use of this and I'm not wholly convinced that working on behalf of an individual organisation should be part of the remit.”

“Not yet made use of this but are considering such support.”

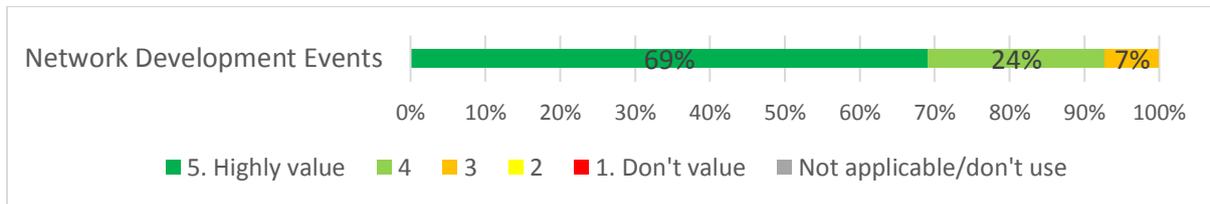
7. Network Development Events

During 2016, three HOLEX network events were organised where national experts came to talk to members directly on where government policy is going. Events have covered Ofsted, Ministers' policy announcements and changes to funding. Two events were held in London, and the Summer event held in Birmingham to widen accessibility. The feedback from these events was excellent.

93% of members rated this as '5' or '4'. The lower number of 'highly valued' responses is probably down to the slightly more limited target audience of network events and issues that can preclude attendance for some members. The events were described as 'focussed, timely and relevant' and as 'invaluable' in terms of policy/funding advice and with regards to the opportunity to network with others.

Factors prohibiting attendance include 'finding time', cost and location.

The chosen locations received mixed feedback with one person praising an ‘out of London’ venue and two people noting that Birmingham is difficult for them. A couple of people mentioned issues with travelling from the North – train tickets never approved/travel embargos meaning ‘can’t go to London or further afield.’ A suggestion was made as to whether the events could be further spread across the country – one in each in the North, middle and South.



As well as the Network events, HOLEX organised over 20 externally funded project related workshops - including 8 on Devolution in London and 6 in other parts of England, two on Localism and 4 on policy development. These sessions were topic based with time to hear directly from members and build on and share experience.

Members' Feedback

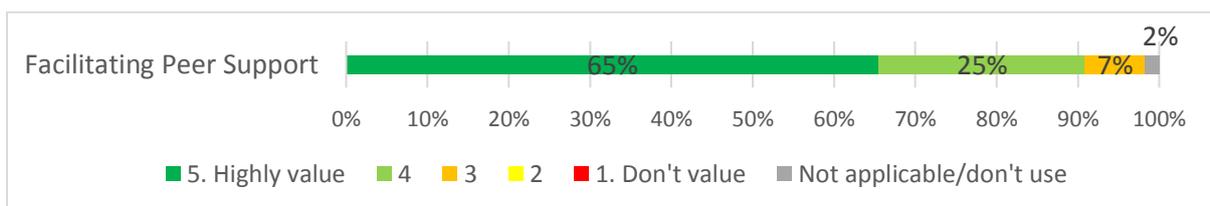
“Varies depending on the speakers and the topics, but always a worthwhile event.”

“Very important to have opportunities to discuss issues with others of a similar status.”

8. Facilitating Peer Support

In 2016, HOLEX members have continued to support each other through network groups and e-groups. This means pressing issues can be resolved quickly. HOLEX members have been quick to answer questions and most are answered within hours of the request being put on the network. This sharing of best practice and/or knowledge with other members is a key strength and unique feature of HOLEX. The most asked questions have been to do with funding, literacy and numeracy, functional skills, Ofsted, job descriptions and structures.

This was described as ‘invaluable,’ with respondents really appreciating the ease with which they can ‘phone a friend’ within the sector.



Members' Feedback

“Geographical neighbours are so different - its important and often easier to work with another area where there will not be any conflict of interest.”

“HOLEX members are very helpful and issues are often answered by the generous participation of colleagues from across the Country.”

“A great way to share best practice and get key information, evidence and support swiftly.”

“The responses by members on this is fantastic and even when it has not been a query we have raised we have learnt something or got an idea as a result of the sharing. Great example of good practice sharing.”

“This could be further developed.”

9. Managing externally funded development projects

Where the focus of activity aligned with member support needs in 2016, HOLEX bid for several externally funded development activities - HOLEX managed 7 large projects, all these projects came in within time and budget and the feedback has been good.

1. Area Reviews. (ETF Funding)

Project Purpose: Preparing Leaders for Area Reviews

2. ELMAG 3 Localism in Action. (ETF Funding)

Project Purpose: Researching and disseminating good practice in devolution areas, specifically looking at skills partnerships.

3. Future Apprenticeships. (ETF Funding via AELP)

Project Purpose: Readiness project: To train apprenticeship leaders and trainers in how to deliver the new apprenticeship standards. The role of HOLEX was as a partner and for the Policy Director to provide expert advice and disseminate information.

4. Mental Health Training. (BIS Funding via L&W)

Project Purpose: Readiness project: To train teaching staff in how to deliver programmes for those with mental health issues.

5. Staff Survey. (ETF funded)

Project Purpose: To survey ACL services about their staff levels.

6. Governance Good Practice. (ETF funded)

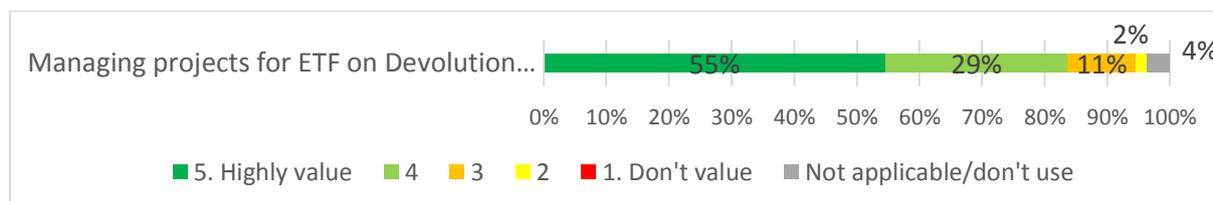
Project Purpose: To establish a base position on ACL governance structures which included evaluating Ofsted reports to identify good practice and to survey ACL services about their governance structures.

7. London ACL Review Coordination, data collection and analysis. (London Gov / BIS Funded)

Project Purpose: BIS grant to cover the cost of providing underpinning work for the London ACL area review.

HOLEX also contributed to the AoC led National Leaders of Governance, Learning and Work Project on Mental Health and ETF projects on Functional Skills, and Leadership.

These projects have helped HOLEX members to prepare for the changes in landscape, commissioning and policy. 84% of respondents rated this service area as '5' or '4.'



Members' Feedback

"I think it's a good idea for HOLEX to manage projects in this way but how about offering them out to tender to HOLEX member organisations to deliver?"

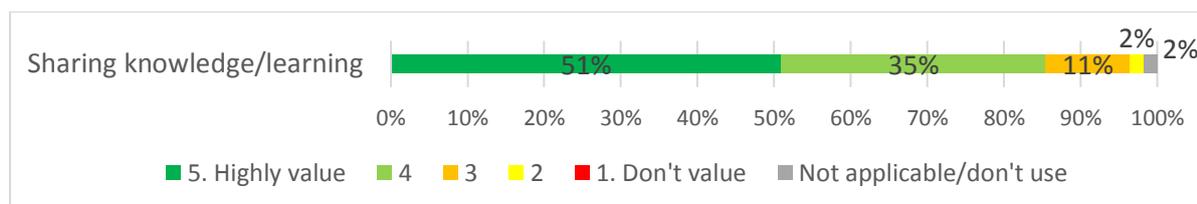
"The Devolution project has been excellent - highly relevant and helpful."

"We've not been involved with any, however I would state Highly Valued otherwise."

10. Sharing knowledge/learning

Throughout 2016 we worked with a range of like-minded organisations to share policy development and ideas. We shared our knowledge and learning and acted as a conduit for other partner organisations such as ETF, SFA, LEFEA, TSLNA, Older Learner Forum, Easy Reads etc. This has progressed to a formal memorandum of understanding with LEAFEA and reciprocal arrangements with the other organisations to share knowledge and working together on representation to government on areas such as funding and adult learning.

86% of members felt that this was a '5' or '4' and a useful addition to HOLEX work.



Underpinning Systems and Working Practices

During 2016, we put in place several new systems/processes and some old ones were overhauled. The HOLEX service offer was documented, a website was created and we now

use the HOLEX domain for our email addresses; all improving our marketing reach and presenting a more established/professional face to the organisation. We have increased our use of technology, including implementing a finance system which has enabled us to streamline our invoicing processes and improve upon internal reporting. In response to feedback we brought in a new electronic communication platform using JISCMail and withdrew from the Yahoo e-groups.

Functions were split so that one person concentrates on the company secretary role and underpinning systems while the other concentrates on adult education and policy changes. This has worked well and will be continued into 2017.

2016 Board and Executive

HOLEX activity is governed by the Association of Adult Education and Training Organisations (AAETO), a not-for-profit company limited by guarantee.

The AAETO Board (voluntary posts)

Barbara Holm (Chair), Head of Westminster Adult Education Service	Pat Carrington (Vice Chair), Principal of City College Peterborough
Joni Cunningham, Principal of Redbridge Institute	Debbie Hunn, Service Manager at London Borough of Hillingdon
Caroline Miller, Service Manager at Newcastle City Learning	

Part-Time Executive

Dr. Sue Pember is the HOLEX Director of Policy and External Relations	Charlie McKenna acts as Operations Officer and is the AAETO Company Secretary
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We also have 10 HOLEX members who have volunteered to be our subject specialist leads.

More information

For more information or to sign up for HOLEX membership, please contact Charlie McKenna at the HOLEX National Office via charlie.mckenna@holex.org.uk or 07759 952972.

Please see also our website - www.holex.org.uk

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