



2017

Annual Report



HOLEX

Championing Adult Education and Learning

Members Comments

- ❖ So grateful for the support and understanding of the team in difficult times. The ongoing dissemination of information is also great and easy to share with staff for reading or discussions.
- ❖ I think that my job would be much harder if HOLEX did not exist and local authority training providers would no longer have a voice on the national stage.
- ❖ HOLEX is my main tool for keeping up to date on what is going on and horizon scanning and I value your services very highly. Thank you.
- ❖ Always very efficient and helpful whenever I've been in touch.
- ❖ HOLEX Office is brilliant - always responds immediately and is hugely efficient.
- ❖ Invaluable network.
- ❖ It is an excellent service and extremely supportive of our ACL sector.
- ❖ Such a useful platform - only been part of it for about 6 months - wish I'd been part of it for longer.
- ❖ Excellent job, well done and thank you.
- ❖ We value HOLEX so very much indeed.

HOLEX 2017 Annual Report and Impact Statement Including Members Views

Foreword by Chair Pat Carrington

This is my first report and I am excited and proud of taking the work of Barbara Holm forward. This report describes the work of HOLEX and what was achieved in 2017 and provides an insight into what members thought of our service. During 2017 the membership increased and feedback from members and partners has been very positive, with colleagues 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 continues to provide the services you require and feel the changes brought in 2016 are working well 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 2018 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 Distribution of 3rd party information that is of interest to members
- 6 Case work
- 7 Network development events
- 8 Facilitating peer support
9. Supporting externally funded development activity
10. Additional professional membership benefits

Priority Areas 2018

In 2018 we wish to build on the good work achieved in 2017, focussing on the service areas listed above and on the key policy changes which will have the greatest impact on HOLEX members.

During 2018 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 present level of European funding is not lost during the Brexit negotiations.
2. Preparing HOLEX members in the 6 Mayoral Combined Authority (CMA) areas for Devolution
3. Working with ESFA to ensure the new Adult Education Budget flexibilities that are being discussed for the work for ACL.
4. Supporting members on quality and helping member organisations move from Ofsted 'Good' to 'Outstanding' where necessary.
5. Working with the FE Commissioner to ensure any support packages are available for ACL providers.
6. Influencing the apprenticeship reform programme, with a special interest in the most vulnerable persons having access to an apprenticeship.
7. Working with DfE to ensure SEND good practice is identified and shared.
8. Work with DfE on the new National Retraining Scheme.
9. Working with ETF and AoC to ensure there is a leadership and governance CPD offer that matches ACL providers' needs.
10. Determining and sharing best practice, implementation structures and governance models.
11. Working with AELP on determining and sharing best equality and diversity practice in recruiting and supporting apprenticeships.
12. Supporting members on delivering English, Maths and ESOL.
13. Helping to establish a digital adult education strategy and the required continual professional development for staff.
14. Working with ETF on work force skills analysis and preparing for the future, including the impact of Brexit on staffing.

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

Best wishes

Pat

Pat Carrington MBE

Chair of HOLEX

2017 Annual Report and Impact Statement

Including Members' Views

HOLEX is the lead body for Adult Community Education and Learning

HOLEX represents a network of 130+ adult and community learning providers and is the sector membership body for Local Authority Community Learning (ACL) services, Institutes of Learning (Specialist Designated Institutions (SDI)) and independent third sector providers who specialise in adult education. HOLEX members have the largest geographical reach of all providers and they educate, train and retrain 600,000+ adult learners annually. They are judged by Ofsted as the sector best for overall performance, with 80% being good or outstanding and top of the league table for customer satisfaction.

All our members share a joint mission to provide skills and learning that give adults a new and often second chance, and 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 leaders' capacity to provide high quality, cost-effective adult learning opportunities within a publicly and individually 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 to enrich their life through learning a new skill. To ensure we are providing the service HOLEX members require, we conducted a member survey and the following describes what we have accomplished and what our members had to say.

2017 Services and Members' Feedback:

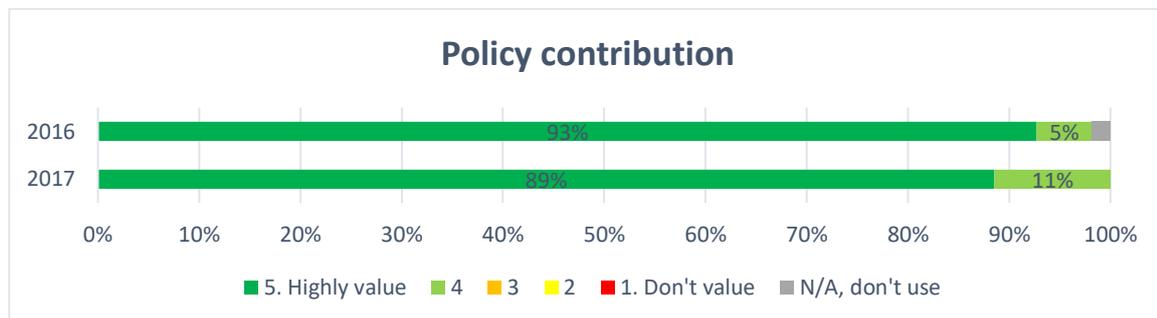
Throughout 2017 we provided HOLEX members with the following services:

1. Policy contribution

In 2017 we were proactive in ensuring we could contribute to new government policy initiatives through contacting and working with Ministers, 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 2017/2018, shaped devolution agreements, contributed to the Skills Summit and the Minister's work on careers, new national retraining schemes and the apprenticeship programme development, including voicing the concerns of apprentices and those who are not able to access an apprenticeship.

We are now able to monitor members' satisfaction across two years. Once again this was rated very highly with respondents particularly recognising the high level at which HOLEX is

currently operating to represent the ACL sector and influence policy. HOLEX was described as having a ‘critical’ voice for the sector and a ‘strong and highly effective presence at the policy table’.



Members' Comments

- ❖ It's really useful to be kept up to date with national agenda from all providers.
- ❖ Clearly without the Adult Mission being on the Agenda and then reflected into Policy, there is little chance in reversing the decline in funding.
- ❖ Excellent work around inclusion of community learning in sector policy.

2. Representation

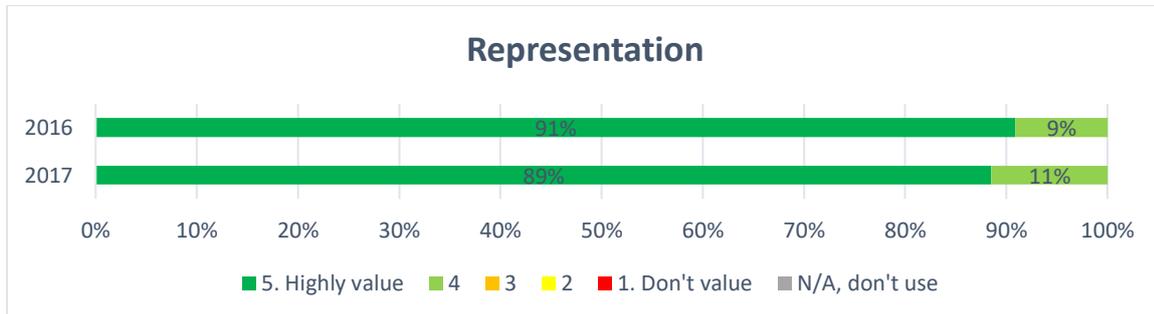
A core purpose of the HOLEX Network is to make representations to Government and to the agencies that manage the funding, qualification and inspection landscape. HOLEX continues to be a recognised part of the Government’s consultation machinery and there are HOLEX members on national groups convened by ETF and ESFA. HOLEX 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.

These documents have become an important part of our armoury in raising the profile and their content has been used to support editorial in several national publications including FT, TES and FE week.

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 Agency Chief Executives, key policy agencies (such as 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 the new National Retraining Scheme, ESOL strategy and All Party Parliamentary Groups, area reviews, student voice, proposed funding changes related to localism and outcome payments, careers and apprenticeship reform. In many instances, our representation on these issues has 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 Continuing Professional Development needs of Community Learning Staff are fully understood.

Respondents once again noted their appreciation of the invaluable collective voice offered by HOLEX; citing that the group enables a reach that could not be achieved alone. The Policy Director's input was described as an 'outstanding contribution,' resulting in a considerable raising of the HOLEX profile which in turn has contributed to community learning consistently being included within sector literature.



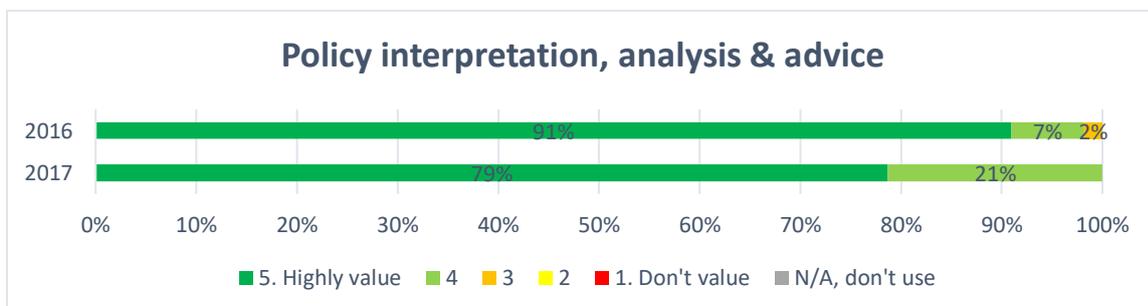
Members' Comments:

- ❖ HOLEX is accessing places that as an ordinary service we would have no way of getting to.
- ❖ HOLEX profile has been raised considerably in last two years. Good to have a viable and respected presence on all bodies.
- ❖ So valuable to have a voice that speaks for all.
- ❖ With so much reduction in resource we simply cannot do this effectively on our own.

3. Policy Interpretation, Analysis and Advice

In 2017, HOLEX generated over 30 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.

Respondents very much appreciate the policy summaries which clarify detail, contextualise issues and help to ensure that things aren't missed.



Members' Feedback:

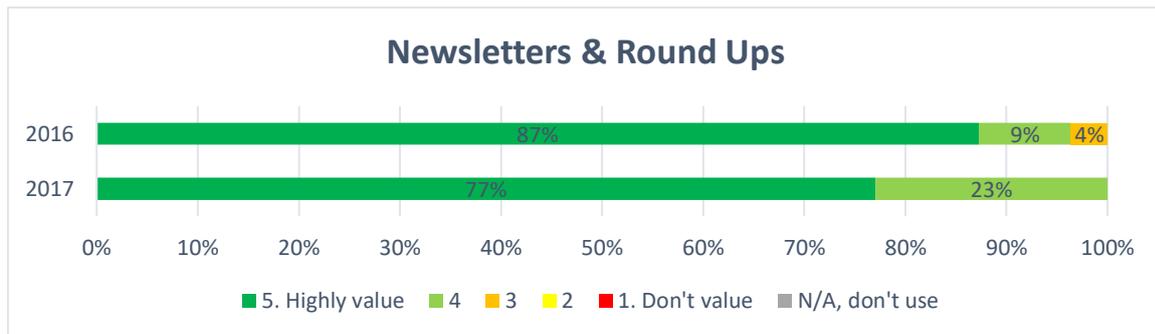
- ❖ Really appreciate being kept up to date - without HOLEX input I could easily miss things.
- ❖ The summaries are always useful in putting the government words into plain English for us all to understand!

- ❖ This service is valued and a trusted and timely source at a time when sense making in a complex environment is key for our sector. It also stimulates us to review and feed into our emergent strategies.

4. Newsletters and Round Ups

We provide monthly policy round ups which cover new policy initiatives and give members an idea of what action they need to take. We also provide immediate responses to any new announcements, such as the Budget and new policies.

This area was once again described as ‘invaluable,’ and as ‘saving managers time’.



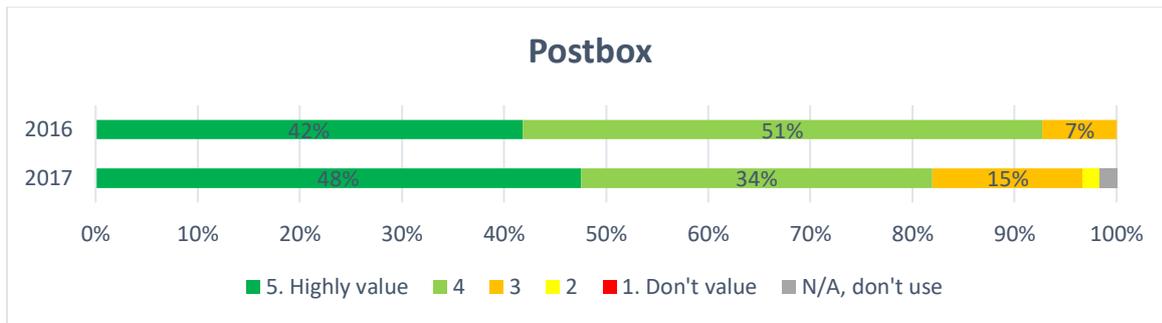
Members' Comments

- ❖ This is so valuable and saves so much time, meaning I am kept informed and up-to-date from one source rather than having to read lots of endless emails.
- ❖ The policy updates are invaluable and opportunity to join national debate is essential for us to raise our profile locally.
- ❖ Saves managers an enormous volume of reading and differentiates which papers and announcements are most relevant to our work
- ❖ Very useful on a practical level. We use the policy briefings wording in the version we share with chief officers/elected members as she gets to the heart of the matter in an easily understood format.

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 200 communications that alerted members to training opportunities and staff vacancies.

At the time of the survey, the Postbox was being used mainly to disseminate third party information/job vacancies and therefore it was a less crucial resource than the Policy Update e-group. Despite this, 82% of people still rated it as either a ‘5’ or a ‘4’ with people noting that it’s made them aware of ‘useful ETF training,’ that it has provided ‘good links’ and that the discounted rates on some events have been a great benefit.



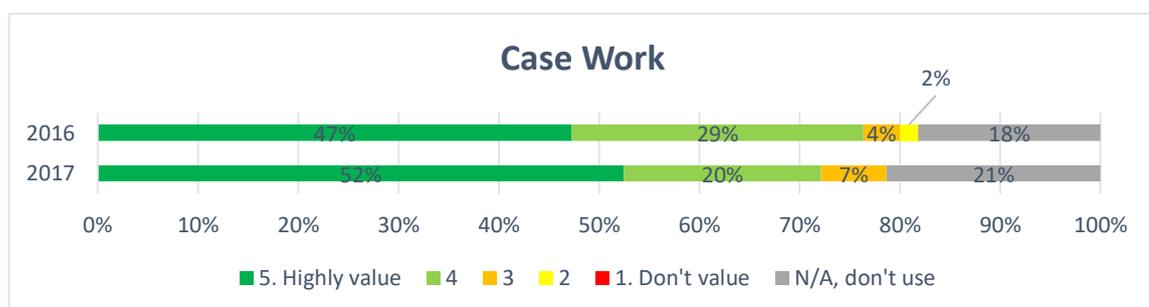
Members' Comments:

- ❖ To get regular signposting to training opportunities has been excellent and has enabled me to find out what's on offer and send staff along.
- ❖ Interesting but rarely use.
- ❖ Need to be clear that forwarding opportunities from third parties is not an endorsement.

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, Ministers, ESFA or Ofsted as necessary. Most of the issues are confidential and have been concentrated around resolving major financial or reputational issues. In 2017, they have related to retendering of the AEB, ESFA contracts, contract novation, interpretation of funding rules, miscommunication, clarifying devolution assumptions and various interpretations of the Ofsted common inspection framework.

Like last year, a number of respondents noted that, whilst they've not had to use this service, it's great to know that this 'valuable' support is there should it be required. Those who have used this service see it as a life saver and somewhere to discuss their most difficult issues.



Members' Comments:

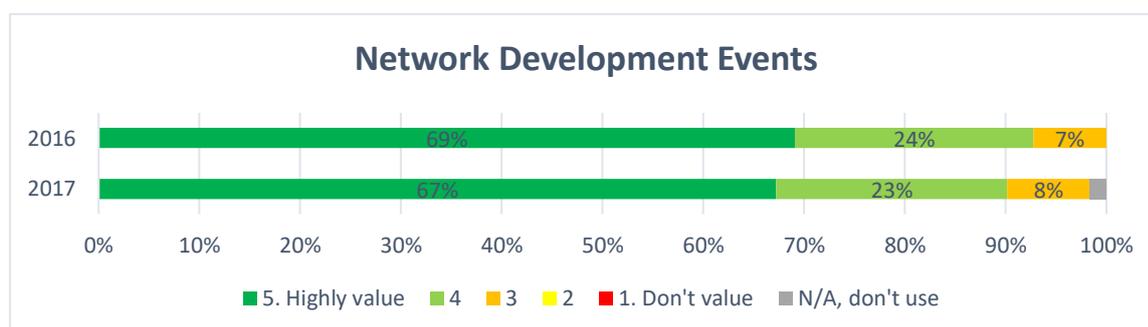
- ❖ Although we haven't used this service personally, I know of providers who have been very satisfied with this support and it is good to know it's there when needed.
- ❖ Having an expert on hand is very reassuring.
- ❖ So grateful for the support from HOLEX in recent times, even when at times it might just be encouragement.

7. Network Development Events

During 2017, 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. HOLEX also initiated and facilitated two free for HOLEX members sponsored events - one funded by NOCN on Ofsted and the FE commissioner and another funded by Tribal on Data and Quality.

90% of people rated this as a '5' or a '4'. The events were described as 'current and informative,' 'unmissable' and a 'great opportunity.'

Respondents appreciated the opportunity for the sector to come together. As always, there were factors prohibiting attendance included cost and location, though there were less comments about this, this year. The Birmingham location was appreciated, and two requests were made for events in the North.



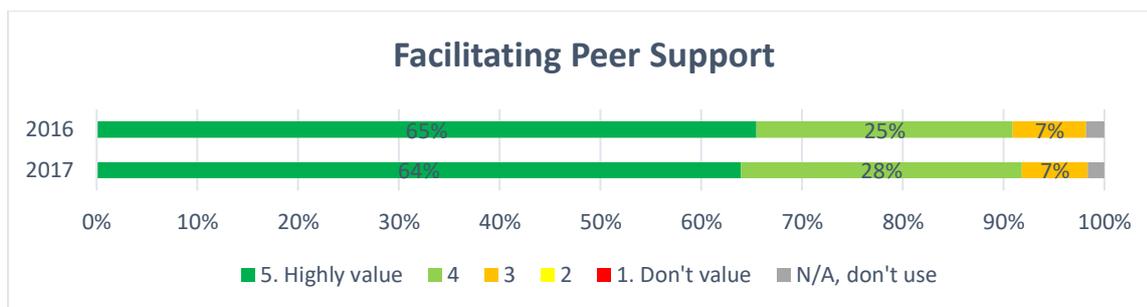
Members' Comments:

- ❖ I attended an event earlier in the year and brought back to our service lots of pointers which helped us prioritise certain improvements such as importance of governance and embedding of 'Prevent'.
- ❖ These events are always a highlight and an integral part of my own CPD.

8. Facilitating Peer Support

In 2017, 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, Safeguarding, Prevent, Identification and open sites, ESOL, functional skills, Ofsted, job descriptions and governance structures.

The facilitation of peer support was described as being 'enormously useful,' enabling members to seek help and learn from others. It was cited as helping to reduce isolation, with the ability to 'phone a friend' being described as being a great resource.



Members' Comments

- ❖ Geographical neighbours are so different – it's 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.

9. Involvement in and Benefit of Externally Funded Projects

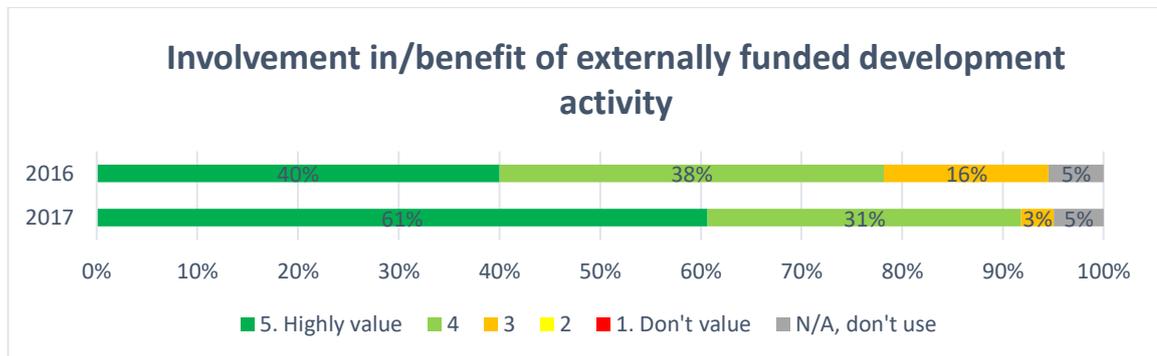
This covers two areas of work. The first is where HOLEX bids for and manages funded projects and the second is where we partner with other agencies to ensure ACL providers have access to their training and development opportunities.

The projects we have been involved with or managed are:

- ❖ BIS London ACL area review
- ❖ AELP Future Apprenticeships: Barriers to apprenticeships; Guidance on how to support disadvantaged learners on apprenticeships
- ❖ AELP Future Apprenticeships Programme: Capacity building providers
- ❖ AELP End Point Assessment Programme: Capacity building
- ❖ ETF Devolution Update and dissemination events
- ❖ ETF SEND
- ❖ ETF/AoC Teach Too
- ❖ ETF/AoC Outstanding teaching and Learning Project
- ❖ ETF Prevent – organising launch events for Side by Side online learner modules
- ❖ ETF/AoC National Leaders of Governance and expanding work into ACL providers
- ❖ Learning and Work conferences
- ❖ Lsect conferences and ensuring access to ACL providers
- ❖ ETF Oxford Saïd Leadership Programme and ensuring access for ACL providers
- ❖ ETF staff survey (SIR)
- ❖ ETF Training Needs Analysis survey
- ❖ ETF full programme

Possibly as a result of the benefit received via the NLG project, this area received a higher degree of positivity this year as compared to last, with 92% of respondents valuing the

activity as '5' or '4' (compared to 78% last year). One respondent noted that, whilst the projects may not have been directly relevant to them, they could see the importance on a national scale. Also, this focus has supported and led to a change in Ofsted grades, with 80% now 'good' or 'outstanding' and very little criticism of governance in the 2017 inspection reports.



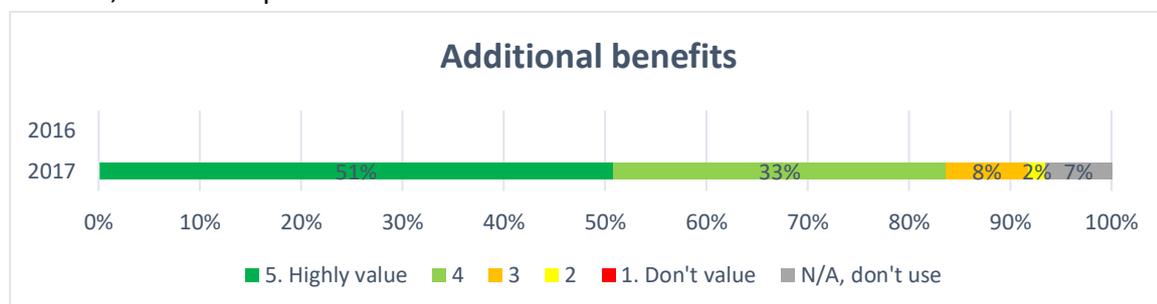
Members' Comments

- ❖ NLG was an excellent intervention for our college and was instrumental in helping us to maintain our good Ofsted rating.
- ❖ Really benefited from the governance initiative. Good to be linked with other arms of the FE sector.

10. Additional Benefits of Belonging to a Professional Body

As HOLEX is now seen as the lead professional body for adult community learning professionals we have been able to start to negotiate extra benefits. These include reduced rates for Learning and Work conferences and a discount for FE Week and Lsect activity including conferences, webinars and advertising in FE week.

Overall, 84% of respondents value these additional benefits.



Members' Comments

- ❖ Any savings are welcome and it's good to have these as part of the HOLEX offer.
- ❖ Really benefited from the governance initiative. Good to be linked with other arms of the FE sector.

Underpinning Systems and Working Practices

During 2017, we put in place several new systems/processes and some old ones were overhauled. The HOLEX service offer documentation was edited and the website updated, and we continue to use the HOLEX domain for our email addresses; all improving our marketing reach and presenting a more established/professional face to the organisation.

In previous years, we have requested that members complete a blank form for membership renewal. This year, we targeted lead contacts with an extract from our database and asked them to review the data we were holding, as opposed to asking them to provide data from scratch. Around 25% of respondents found this approach easier than previous years and no one found it harder, therefore we will use this renewal method again next year.

In response to feedback, we brought in a new electronic communication platform using JISCMail; this has been a very welcome replacement to the previous e-groups with easy sign-up of new members, no odd re-formatting of emails, an easily accessible online archive, no advertising and great technical support from JISCMail.

We have very recently (November 2017) changed the way in which the e-groups are used and structured. Going forwards, the HOLEX Postbox will become the main communication channel for sharing of info; it will be a 'closed' group, with replies configured to go only to the sender of the email. The re-branded HOLEX Policy Exchange will become the forum for exchange/debate of information with replies going to the whole group. All other e-groups remain 'open' so that responses go to all members of the groups.

Underpinning Financial Position

HOLEX is a subscription based service which is provided by the Association of Adult Education and Training Organisations (AAETO), a not-for-profit company limited by guarantee. The organisation is financially sound and covers its costs. The main income covers the operating costs of the HOLEX National Office, the Operations Officer and Policy Director and the three major network events. HOLEX has managed to not increase its fees for the last two years and remains committed to keeping the network conferences free of charge. Any unspent funds are ploughed back into providing new development opportunities for ACL services.

2017 Board and Executive

HOLEX's activity is governed by the board of the Association of Adult Education and Training Organisations (AAETO).

The AAETO Board (voluntary posts)

Barbara Holm - Chair (until April 17), Head of Westminster Adult Education Service	Pat Carrington – Chair (from April 17), Principal of City College Peterborough
Joni Cunningham - Vice Chair, Principal of Redbridge Institute	Debbie Hunn, Service Manager at London Borough of Hillingdon

Caroline Miller, Service Manager at Newcastle City Learning	
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Policy Leads

Dipa Ganguli, Assistant Principal – Finance and Business Support Services for Westminster Adult Education Service	Ilgun Yusuf, Head of Service for Norfolk County Council Community Learning Services
Kerry Gray, Head of Service of Leicester Adult Skills and Learning Service	Arinola Edeh, Head of Service for Westminster Adult Education Service
Sue Hasty, Principal of Southend Adult Community College	Simon Beer, Head of Service, London Borough of Haringey Adult Learning Service
Simon Leveaux , Deputy Head of Idea Store Learning, London Borough of Tower Hamlets	Simon Martin, Director of Sutton Community Academy (ATT - Academy Transformation Trust)

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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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 our website - www.holex.org.uk

HOLEX is a trading name of the Association of Adult Education and Training Organisations (AAETO), a company limited by guarantee and registered in England and Wales under Company Number 07230542.

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