

Rebalancing the system

The main report of the Inquiry into the Future for Lifelong Learning calls both for a basic rethink of the way we divide up our adult lives and a rebalancing of resources to enable people to take control at every stage.

TOM SCHULLER and **JENNY WILLIAMS** report

Learning Through Life, the main report from the Inquiry into the Future for Lifelong Learning, was published last month. It is the culmination of a two-year process of consultation, analysis and reflection. It is not, though, the conclusion; there are still many IFLL publications in the pipeline, to be published in the next few weeks, and the publication of *Learning Through Life* is, or should be, just the start of a new phase. The major challenge now is to get the report's recommendations debated widely, and adopted.

The report sets out bold proposals which go well beyond the boundaries of adult education and training. First, though, a word about the process. The Inquiry was sponsored by NIACE but steered by a group of independent commissioners, chaired by Sir David Watson. The commissioners met 10 times, including one 24-hour session. Over time, the broad shape of the Inquiry's main arguments emerged, but there was always a fine balance to be struck. On the one hand, we did not want to close down different options too early; on the other, we needed to identify the key proposals in order to give ourselves time to develop them to the fullest extent. The challenge, after all, was considerable, with nine big themes to grapple with and 250 submissions to sift. We were even urged by some to develop a new language for lifelong learning, as well as practical recommendations. The commissioners, and especially the chairman,

held their nerve throughout, and allowed the actual proposals to evolve from positions which, at the start, could not be clearly defined.

We identified several key weaknesses in the current system. Perhaps the most fundamental of these issues concerns whether there is any recognisable 'system' of lifelong learning at all. Aiming for a more systematic approach might lead to the exclusion of those untidy aspects of learning provision which do not fit neatly into organisational charts or under budget headings. Our notion of a system is an organic one – we were taken by the metaphor of a 'learning ecology' which Ann Hodgson and Ken Spours put forward in one of the IFLL Sector Papers. It is something whose parts interact, and which evolves over time – but which must have some recognisable interconnectedness and continuity. We need more of both of these.

The main weaknesses include: the shortcomings of initial education in laying a true foundation for lifelong learning; the lack of response to key demographic changes, most obviously the ageing of the population; the failure to recognise the extended and complex transitions into and out of employment, especially at the beginnings and ends of people's working lives; persistent inequalities of opportunity and resource, and especially the way these inequalities grow over the life-course (what we call the Matthew effect: 'For to all those who have, more will be given, and they will have an abundance; but

from those who have nothing, even what they have will be taken away', from the Gospel According to St Matthew); excessive centralisation and lack of trust of the local (in England – we should note here that the Inquiry covered all the nations of the UK, whose variety posed a further set of interesting challenges); and finally, as we saw it, a lack of 'intelligence' in the system, that is, a low capacity to learn lessons from the past and from each other, and to build a proper research base.

The 10 main recommendations are listed on page 11. Rather than give just a paragraph to each, in this piece we have chosen to focus on four.

A new model of the life-course

The broadest recommendation is for a basic rethink in the way we divide up our adult lives. We are used to thinking of childhood, then youth, as lasting up to around 18 (or is it 21?), followed by an adult working life generally reaching to 60 or 65, and a stage thereafter called retirement.

This structure is outmoded, with damaging consequences for how opportunities and resources are distributed. Taking 18 as now, in effect, the end of the compulsory education period, our new model divides the rest into four stages: up to 25, 25-50, 50-75 and 75+. The proposal has a disarming mathematical simplicity but is based on hard empirical trends. Young people take longer to settle into a defined

career. Increasing longevity sees the numbers of those over 75 increasing by around 50 per cent in the next decade. Between these two, people in the third age often want to mix part-time paid employment with unpaid work and other activities. And 'second-agers' (25-50) suffer from a time squeeze which sees their average life satisfaction decrease steadily.

All this points to a new distribution of work and learning across the life-course. The dividing lines – 25, 50 and 75 – are what lawyers call 'bright lines' when deciding on discrimination; they are broad divisions which reflect overall trends and assumptions, without putting individuals into particular boxes. They are, in fact, a blend of the present and the future: on the one hand, they recognise significant existing trends; and, on the other, they enable policymakers and practitioners to look ahead and make more appropriate responses to these key changes in demography and the labour market.

We see an inevitable trend for people to work to later in life, but this should usually be for fewer weekly or annual hours. We want to destroy the practical and psychological barriers which inhibit investment in older people's learning. At the same time, we want to enable people before 50 to have a better mix of work, learning and other activities, for less stress and more fulfilment.

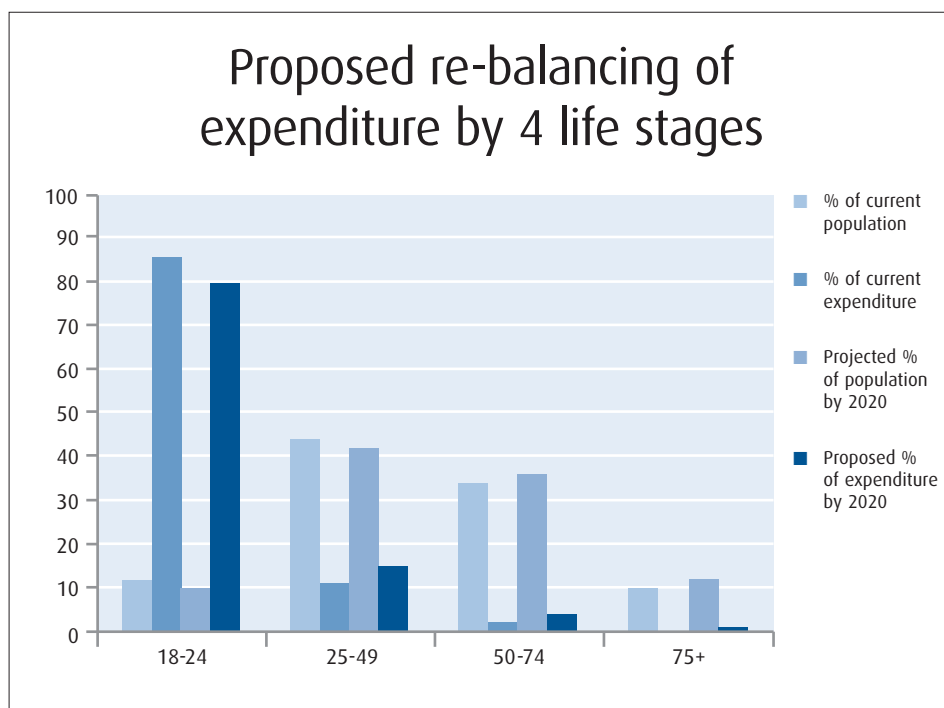
Identifying a discrete fourth age (75+) is potentially controversial. We do not seek to segregate people over 75 or regard them as in inevitable decline. To the contrary: the Inquiry recommends a doubling of the resources for learning in this age group. But physical dependency tends to increase around this age. We need far more work on how learning at this stage can help people maintain independence of all kinds. This includes making sense of one's life as the end of it approaches. Indeed, this stage epitomises our general priority: that learning should give people control over their lives, practically and in terms of personal identity.

Resources

Public and private resources invested in lifelong learning amount to some £55 billion. We argue that their distribution should reflect a coherent view of our changing economic and social context and that to do this requires rebalancing resources fairly and sensibly across the different life stages.

£55 billion is a large sum – approximately 3.9 per cent of GDP. It represents our overall estimate of how much is spent on post-compulsory education and training provision by the public, private and third sectors, and individuals in the UK. The figure could be even larger – adding in the cost of time spent on learning takes it to £93 billion – but £55 billion is our preferred figure for the Inquiry's rebalancing proposals.

We calculated the current allocation of resources across the life-course using

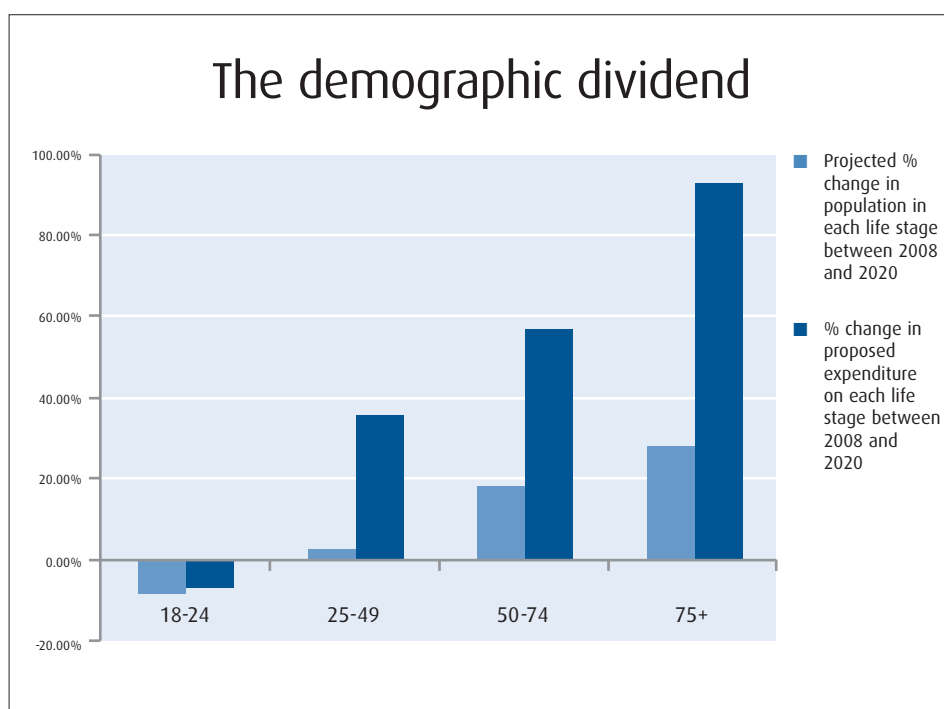


NIACE's participation figures to derive an estimate of the numbers within each of the four stages that currently participate in learning. We then drew on analysis of time-use to estimate what this means in terms of average duration of participation. It's obvious that young people not only participate more, but that their participation on average also lasts a lot longer. Our calculations reveal an allocation of resources skewed towards young people: 86 per cent of expenditure on 18-25 year olds; 11 per cent on 25-50 year olds, most of which goes to those who are already well trained; third-agers get 2.5 per cent of

the overall resource; with just 0.5 per cent for the over-75s (see above chart).

The major demographic and labour market changes that we face require a shift in this balance. Proportionately, more needs to be spent on those over 25, and particularly those over 50. It looks a modest adjustment but we propose a re-balancing to 80 per cent for 18-25 year olds, 15 per cent for the 25-50 group, and four and one per cent respectively for the third and fourth staggers.

This would release an additional £3.2 billion to be spent on those over 25 (see below). It would increase investment in



learning in the second stage from around £6.1 billion to £8.2 billion; in the third stage from around £1.4 billion to £2.2 billion; and double investment in the fourth stage from a broad estimate of £285 million to around £550 million. There is a demographic dividend here too: there will be fewer young people by 2020 so this can be done without reducing the per capita spending on them.

The adjustment is not so much a specific target as a collective aspiration for a fairer spread. Our proposal is about rebalancing resources across the board: it's about how employers, individuals and families might choose to invest in learning throughout life in future as well as how public resources are allocated.

Entitlements

The Inquiry sees learning throughout as a human right – not necessarily a right to be legally enforced, but as an aspiration to which civilised societies should aspire. We give the notion practical application by specifying a number of particular learning entitlements.

Two general ones build on existing practice. We want to see the current entitlement to basic skills extended to people of all ages (not just of 'working age'), with additional access for spouses with English language needs. Secondly, we envisage a minimum threshold of competence to which everyone should have access so they can take part in a modern economy. This threshold is, at present, generally considered to be at Level 2, rising to Level 3 in the near future. *Learning Through Life* does not specify a particular level, since a narrow vertical view of progression is unhelpful. So we argue for a broadening as well as a lifting of the threshold.

An entitlement to 'learning leave' should evolve as a widespread feature of good employment practice. Learning leave means time off from work to study. Schemes to enable this are best designed to fit with the varying contexts of different sectors and organisations. We already have many examples: from the EDAP initiative in Ford Motor Company to rights to time off for professional development in the teaching and other professions. What works in one industry may not be appropriate in others, for all sorts of reasons. It will be easier to achieve progress if employers and unions can get together to design a scheme which meets their particular circumstances.

The table above summarises the entitlement proposals. It contains examples of what we call 'transition entitlements'. These are designed to give people access to learning to help them cope with challenging passages in their lives. A significant example is when offenders leave prison. Providing them with a guaranteed place on a course could play a major part in helping them not to slip straight back into offending behaviour, by giving them a goal and access to different

| General entitlements | Specific transition entitlements |
|--|--|
| <ul style="list-style-type: none"> • A <i>legal</i> entitlement of free access for all who need it to learning to acquire basic skills, i.e. literacy and numeracy, up to Level 1. • A <i>financial</i> entitlement to a minimum level of qualification needed to be able to play a full contributing part in society; this is currently Level 2, but will rise and change over time. • Both these entitlements should extend to all, regardless of age. • A '<i>good practice</i>' entitlement to learning leave as an occupational benefit to be developed flexibly and over time as part of mainstream employment conditions. | <ul style="list-style-type: none"> • To help people use learning to make potentially difficult transitions; for example: <ul style="list-style-type: none"> – guaranteeing access to learning for those leaving prison or institutional care; – moving between areas or countries; or – on their 50th birthday • These to be developed flexibly over time. |
| Underpinned by infrastructural guarantees | |
| <ul style="list-style-type: none"> • Universal access to advice and guidance. • Universal access to a minimum level of digital technology (currently broadband at 2Mbps, but this will rise and change). | |

social networks.

A different example is what we call a 'welcome entitlement'. Encouraging people to enrol in learning when they move to a new area (including to the UK from elsewhere) would help them integrate into their new community, and find their feet socially as well as economically.

Entitlements should also be a way of making progress on equality of opportunity. Public support for it should be geared to helping those who have benefitted least from education so far. This is very much the spirit of the current system of Individual Learning Accounts in Scotland, which is geared to low-income households.

The *Learning Through Life* entitlements are underpinned by a proposal for a national system of Learner Accounts, encouraging investments by the state, employers and individuals. The state contributions should be, as in Scotland, skewed towards the least advantaged. Somewhat controversially, we propose diverting some of the money currently going to Children's Trust Funds to support Learner Accounts, on the basis that investing in learning is more likely to provide a real asset than a cash sum at 18.

A citizens' curriculum

A further proposal is for a common framework for a citizens' curriculum. We emphasise 'framework'; this is emphatically not a single curriculum imposed from the top. It is an outline, to be filled in locally, of the kinds of knowledge and skills which all citizens might need in order to exercise control over their own lives. A common framework provides a degree of coherence and solidarity; encouraging local interpretation generates innovation.

Nobel laureate Amartya Sen's work on capabilities provided the inspiration for

using 'capabilities' as the basic component. Capability, in Sen's terms, goes beyond knowledge and skills; it suggests a real involvement in acting, in exercising competence.

The four capabilities proposed are: digital, health, financial and civic. The *Learning Through Life* recommendation is that there should be universal access to learning for such capabilities, through a minimum local offer. Obviously, the capabilities exist at different levels: some already have high levels of digital capability, others not, but all will have access to appropriate opportunities to learn. Crucially, we include critical awareness as an integral component, in all cases. Taking health capability as an example, this entails the capacity to manage one's own physical and mental health, but also the capacity to understand what produces good and bad environments, and to join with others in improving these.

Learning Through Life also recommends reviving local powers, in various ways. Here there is space only to mention one specific proposal, for Local Learning Exchanges (LLEs). These would provide physical space for people to come together, as learners, teachers, or both. LLEs would be a forum where people could offer to teach skills they have, perhaps in return for learning from others. They might also pool their individual entitlements. They would build on good practice, such as that seen in U3As, linking this with the new adult advancement and careers service and with access to new technologies. Public libraries would be a natural location.

We have had space only to give a sample of the Inquiry's analysis and recommendations. As we said at the beginning of this article, publication of *Learning Through Life* is only the culmination of one phase. NIACE will



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now take forward the agenda, in partnership with a range of organisations. With a general election looming, we intend to make sure that the issues are actively debated on as many hustings as possible.

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HAVE YOUR SAY

- Do you think the Inquiry has succeeded in offering 'an authoritative and coherent strategic framework for lifelong learning in the UK'?
- Do the Inquiry recommendations represent an adequate means of addressing the weaknesses – and imbalances – of a system which has, in recent years, prioritised job-related training to the detriment of wider adult learning?
- Which recommendations represent political priorities and how should they be implemented?

Let us know what you think by emailing us at: comment@niace.org.uk.

Turn to page 12 for more of the detail of the Inquiry's work, including its findings on wellbeing and happiness, poverty reduction, further education, and citizenship and belonging

Learning Through Life: the proposals

- Base lifelong learning policy on a model of the educational life-course, with four key stages (up to 25, 25-50, 50-75, 75+). *Our approach to lifelong learning should deal far more positively with two major trends: an ageing society and changing patterns of paid and unpaid activity.*
- Rebalance resources fairly and sensibly across the different life stages. *Public and private resources invested in lifelong learning amount to over £50 billion; their distribution should reflect a coherent view of our changing economic and social context.*
- Build a set of learning entitlements. *A clear framework of entitlements to learning will be a key factor in strengthening choice and motivation to learn.*
- Engineer flexibility: a system of credit and encouraging part-timers. *Much faster progress is needed to implement a credit-based system, making learning more flexible and accessible with funding matched to it.*
- Improve the quality of work. *The debate on skills has been too dominated by an emphasis on increasing the volume of skills. There should be a stronger focus on how skills are actually used.*
- Construct a curriculum framework for citizens' capabilities. *A common framework should be created of learning opportunities which should be available in any given area, giving people control over their own lives.*
- Broaden and strengthen the capacity of the lifelong learning workforce. *Stronger support should be available for all those involved in delivering education and training.*
- Revive local responsibility ... *The current system in England has become over-centralised, and insufficiently linked to local and regional needs. We should restore life and power to local levels.*
- ... within national frameworks. *There should be effective machinery for creating a coherent lifelong learning strategy across the UK, and within the UK's four nations.*
- Make the system intelligent. *The system will only flourish with consistent information and evaluation, and open debate about the implications.*