Department for Education

DRAFT

Skills Policy Analysis

Reopening FE providers – analytical pack

July 2020

Purpose: Explore the key issues and current evidence around reopening Further Education (FE) providers

Contents:

Learner numbers by age and provider type: September 2019

Learner numbers in FE vary across the year and by characteristics

- Around 1.7m learners were enrolled in Further Education in September 2019, with around 750,000 aged 16-18.
- September is a normal high point for new enrolments, but the number of actual learners enrolled in FE will fluctuate over the year as new learners enrol and other learners complete or drop out.[2]

- Looking forward, we don't know:
  - The impact of COVID-19 and any recovery package on new enrolments.
  - How many learners will want to come back (due to safety concerns or loss of engagement during the lockdown).
  - How many learners will be allowed on site due to health and safety.

FE learners in September 2019 by learning type, provider type and age[1]

		Learning type					Total
		Apprenticeships	Traineeships	Education and Training	Community Learning	Other	
	Total	508,600	5,800	1,097,400	130,700	1,000	1,743,500
General FE College	All ages	144,000	700	756,500	20,800	300	922,300
	16 to 18	40,300	400	454,000	~	100	494,800
	19 to 23	56,900	200	80,800	1,400	100	139,400
	24+	46,800	~	221,700	19,500	100	288,100
Other Public Funded	All ages	69,300	100	107,100	80,100	100	256,700
	16 to 18	7,400	100	50,300	~	~	57,900
	19 to 23	24,100	~	6,100	2,900	~	33,200
	24+	37,700	~	50,700	77,100	~	165,600
Private Sector Public Funded	All ages	289,500	5,000	83,000	700	700	378,800
	16 to 18	43,100	4,000	23,800	0	100	70,900
	19 to 23	88,700	900	12,100	~	100	101,800
	24+	157,700	100	47,100	600	500	206,100
Schools	All ages	300	0	3,600	400	0	4,300
	16 to 18	100	0	3,100	0	0	3,200
	19 to 23	100	0	400	~	0	600
	24+	100	0	100	400	0	500
Sixth Form College	All ages	1,200	~	114,700	600	~	116,500
	16 to 18	200	~	109,300	0	~	109,600
	19 to 23	500	~	1,700	~	0	2,300
	24+	500	0	3,600	600	0	4,700
Special Colleges	All ages	4,200	~	32,500	28,100	~	64,800
	16 to 18	1,400	~	17,800	0	~	19,200
	19 to 23	1,500	~	2,800	500	~	4,800
	24+	1,300	0	12,000	27,600	0	40,900

[1] ILR 2019/20 SN10 (provisional) data. Note: Excludes a small number of learners with unknown age or aged under 16. School Sixth Forms covered by schools analysis. Rounded to the nearest 100. ~ represents figures which round to zero but are not actually zero. A single learning type is allocated to a learner via a hierarchy (Apprenticeships, then Traineeships, Education and Training, Community Learning, Other), to avoid double counting. See here for more information on FE statistics methodology. [2] There are more learners in FE across the year, but as learners can do courses under a year the total in September is lower.

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Learner numbers by age, gender and ethnicity: September 2019

Over 150,000 FE learners are aged 50+, with a fifth of them BAME

- Around 150,000 (9%) of FE learners in September 2019 were aged 50 or over, with around two-thirds being women.
- Over 400,000 FE learners are BAME, which accounted for almost a quarter of learners in September 2019.
- There were almost 30,000 BAME 50+ FE learners in September 2019.

FE learners in September 2019 by age, gender and ethnicity[1]

Gender	Age	White	BAME	Not Provided	Total
Female	16 to 18	273,000	76,000	5,000	354,000
	19 to 23	91,000	25,000	2,000	118,000
	24 to 49	237,000	109,000	12,000	358,000
	50-59	45,000	14,000	2,000	61,000
	60+	36,000	5,000	2,000	44,000
	Total	683,000	228,000	24,000	936,000
Male	16 to 18	306,000	90,000	6,000	402,000
	19 to 23	131,000	30,000	3,000	164,000
	24 to 49	139,000	48,000	8,000	194,000
	50-59	20,000	7,000	1,000	28,000
	60+	16,000	3,000	1,000	20,000
	Total	612,000	177,000	19,000	808,000
Total		1,295,000	405,000	44,000	1,743,000

- Around 25,000 of 50+ learners are on an apprenticeship.
- 60% of 50+ BAME learners are undertaking Education and Training, compared to only 34% of 50+ White learners.

50+ FE learners in September 2019 by gender, ethnicity and type of learning[2]

Gender	Type of learning	White	BAME	Not Provided	Total
Female	Apprenticeship	13,200	2,400	300	15,900
	Education and Training	26,600	11,000	1,500	39,000
	Community Learning	41,500	5,800	2,900	50,200
	Total	81,300	19,100	4,700	105,100
Male	Apprenticeship	7,200	1,500	200	8,900
	Education and Training	12,900	5,900	800	19,700
	Community Learning	16,400	1,800	1,000	19,200
	Total	36,500	9,200	2,000	47,700
Total		117,800	28,300	6,700	152,900

[1] ILR 2019/20 SN10 (provisional) data, rounded to nearest 1,000. Note: Excludes a small number of learners with unknown age (<150) or aged under 16 (<4,000). School Sixth Forms covered by schools analysis. [2] ILR 2019/20 SN10 data, rounded to nearest 100. Note: Excludes a tiny number of other modes of learning (~50).

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Estimates of learner numbers on site: July and September 2020

Around half of all FE learners are usually on site at any given time

- The part time nature of many FE courses (particularly adults) and the workplace element of apprenticeships and traineeships means not all learners would normally be on site at the same time.
  - 16-18 apprentices and community learners are assumed to be on site one day a week.
  - Half of 19+ apprentices are assumed to be on site one day a week (with the other half taught elsewhere, e.g. online or at the employer's premises).
  - Traineeships and part time education and training learners are on site between one (low) and 2.5 days (high) per week.
  - 93% of 16-18 year olds, 34% of 19-23 year olds, and 3% of those aged 24+ education and training learners are full time (at least 540 Guided Learning Hours) and assumed to be on site every day.
- Using these assumptions it suggests **830k to 965k learners attended each day in September 2019**, of which 190k to 310k are adults, and 640k to 655k are age 16-18.

- There are normally fewer learners in July: ~1.5m compared to ~1.7m in September[1].
- Of those in scope for a July return this is made up of 755,000 16-18 year olds and 765,000 19+ learners (40,000 delayed assessments[2] + 420,000 adult apprentices + 305,000 Level 1 and below).[3]
- Using the same assumptions about attendance as above, this results in potentially 150k to 245k adults attending each day in July. We would not expect the same level of demand as normal. Assuming only half returned (382k adults) would give an estimate of **75k to 110k adult learners attending each day in July** (and August).
- Since 1 June approximately up to 400k 16-18 year olds have been allowed to return, with a maximum of 25% on site at any one time. We would expect the majority of these 100k learners to stop attending from the end of July as the summer term ends, creating spare capacity for adults. Included in those continuing through the summer are apprentices, who would only be on site one day a week.

[1] ILR 2019/20 SN10 (provisional) data. [2] AEB/ALL funded learners doing a L2 or L3 aim with delayed/adapted assessment (based on ESFA data), due to complete their aim between March 20 and July 31st 2020 (from ILR planned end date). [3] This means there are potentially 220,000 more 19+ learners who are in scope for a September 2020 return.

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Transport

A large proportion of FE learners rely on public transport

- 16-18 year olds are more likely than children at school and 19+ adults to use the bus to travel to education.
- 18% of FE learners travel more than 10 miles to learn, with 64% travelling more than 2 miles.
- There are some areas – North of England, East England and Cornwall – where less than 20% of learners have access to a college within 10km.[3]
- Unlike other parts of the post-16 education system, disadvantaged learners are more likely to participate in FE than more advantaged learners.[4]
- FE learners are more likely to live in the most deprived areas of England than the least deprived areas.[4]
- This suggests that FE learners are likely to be more reliant on public transport than learners from other education sectors.

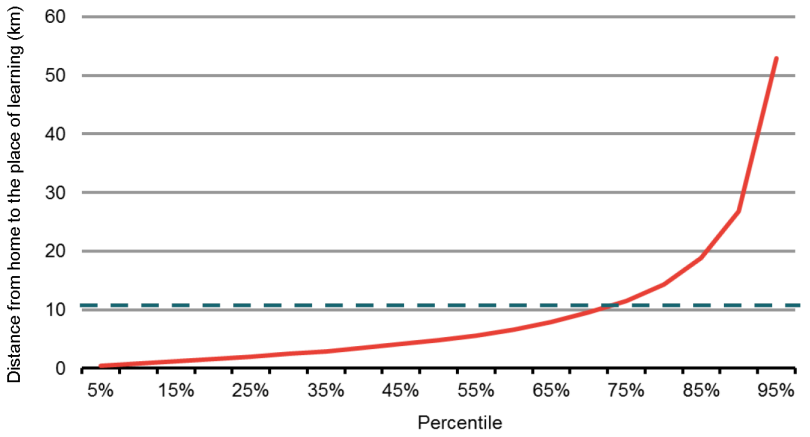
Proportion of trips to education by mode of travel and age, England 2018[1]

	Age band		
Mode	0-15	16-18	19+
Walk	46%	22%	43%
Bike	3%	3%	1%
Car/motorbike	37%	24%	24%
Bus	9%	34%	17%
Underground	0%	1%	3%
Rail	1%	6%	9%
Taxi	1%	1%	1%
Other public	0%	1%	1%
Other private (e.g. private bus)	4%	7%	0%

Distances travelled from home to FE provider: based on September 2019[2]

Distance band	Learners	%
0-2 miles	572,500	33%
2-4 miles	365,200	21%
4-10 miles	439,100	25%
10+ miles	308,300	18%
Unknown	58,400	3%
Total	1,743,500	100%

Visual representation of distances travelled from home to FE provider[3]



[1] National Travel Survey 2018, DfT [2] ILR 2019/20 SN10 (provisional) data – UNPUBLISHED [3] BIS (2016); Understanding the FE Market in England; https://www.gov.uk/government/publications/understanding-the-further-education-market
[4] Indices of multiple deprivation (IMD); https://www.gov.uk/government/publications/further-education-indices-of-deprivation-england-2015-to-2016. Further education for benefit claimants in England: 2017 to 2018; https://www.gov.uk/government/statistics/further-education-for-benefit-claimants-in-england-2017-to-2018.

Estimates of learner numbers by mode of transport: July 2020

We can estimate the range of FE learners that will need public transport

- Using the adult learners in scope for a July 2020 return as the basis, the 'proportion of trips to education by mode of travel and age' DfT data and the assumptions around the numbers on site at any given time and reduced demand, we can estimate the demand for different modes of transport.
- These estimates suggest that there could be between **13k to 21k adult learners travelling to their provider by bus**, with an additional 2k to 4k by underground, and 7k to 11k by rail.

- This should be an overestimate, as this does not account for behavioural change – you would expect some 19+ FE learners who are able to switch to private forms of transport to do so due to health and safety concerns. It also doesn't account for providers shifting their focus away from face-to-face provision towards online provision.
- This increased demand is lower than estimated for schools but would still place an extra burden on public transport capacity.
- Travel to FE compared to schools may also more spread out over the day (i.e. less confined to peak travel times).
- The number of journeys taken may be higher if part time learning is spread over multiple days, e.g. two morning sessions on different days.

Range of estimated adult FE learner demand for transport by mode of travel

	Adults	
Mode	Lower	Upper
Walk	32,000	52,800
Bike	1,100	1,800
Car/motorbike	17,700	29,200
Bus	12,700	20,900
Underground	2,300	3,800
Rail	6,600	10,900
Taxi	1,100	1,800
Other public	600	1,000
Other private (e.g. private bus)	0	100
Total	74,100	122,200
Total public transport	22,200	36,600

[1] Analysis by schools colleagues takes into account the impact of 16-18 year old learners in FE returning to education on transport demand, however it does not account for those aged 19+ returning.

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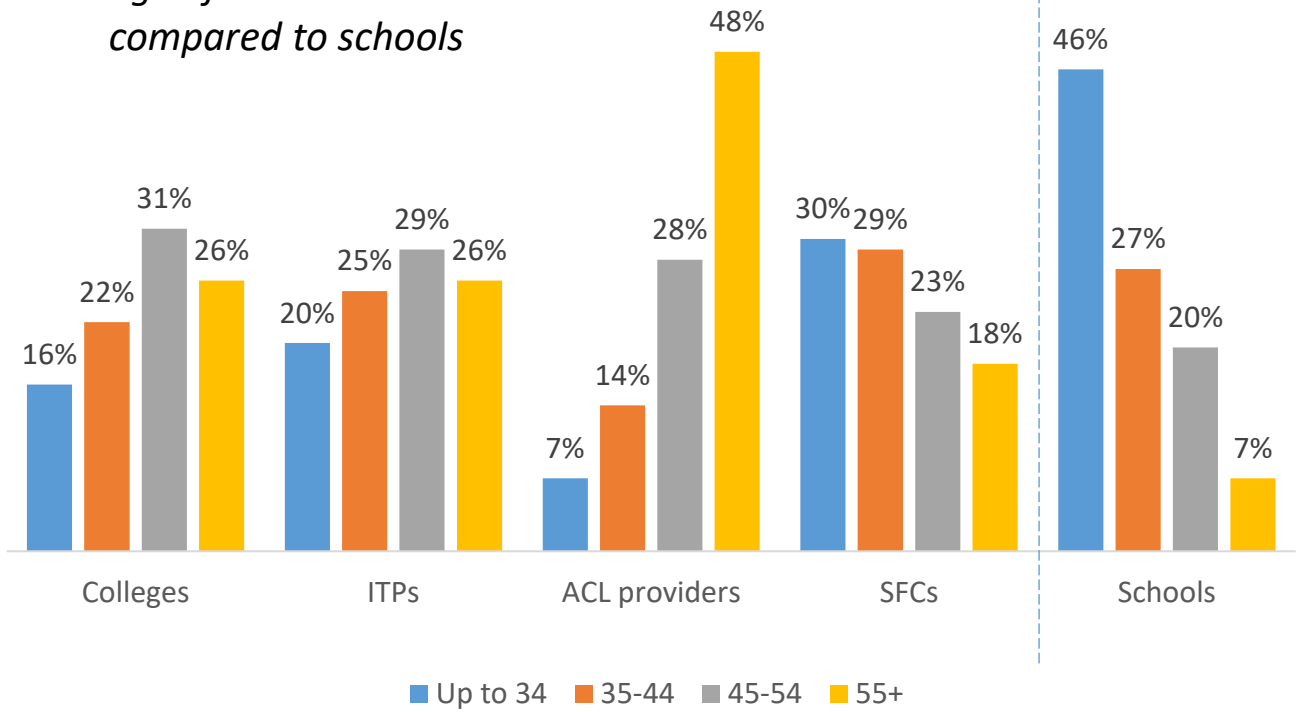
Workforce

FE workforce are more likely to be older and have a health condition

- There are 97,000 teaching staff and 22,000 leaders, teaching across 1,400 providers in England.
- There are 216,500 staff, including non-teaching staff such as admin, support staff, technical staff etc, in the whole FE sector.[1]

- Teachers in FE tend to be older than in schools; over half are aged 45+ (and a quarter aged 55+) compared to only a quarter (and 7% aged 55+) in schools.
- BAME staff are underrepresented in FE compared to general working age population in England and Wales.
- Around 1 in 6 staff said they had a disability or health condition. This is slightly lower than the general working age population (19%) but far higher than schools - likely due to older average age of the workforce.

Age of teachers in FE compared to schools



Base: 7,856 college, 579 ITP, 132 ACL, 117 SFC & 383,366 school teachers

[1] Staff Individualised Record 27 (2018/19) https://www.et-foundation.co.uk/research/workforce-data/
Sources for rest of slide: College Staff Survey: 2018; Education and Training Professionals Survey: 2019; Schools Workforce Census 2018.

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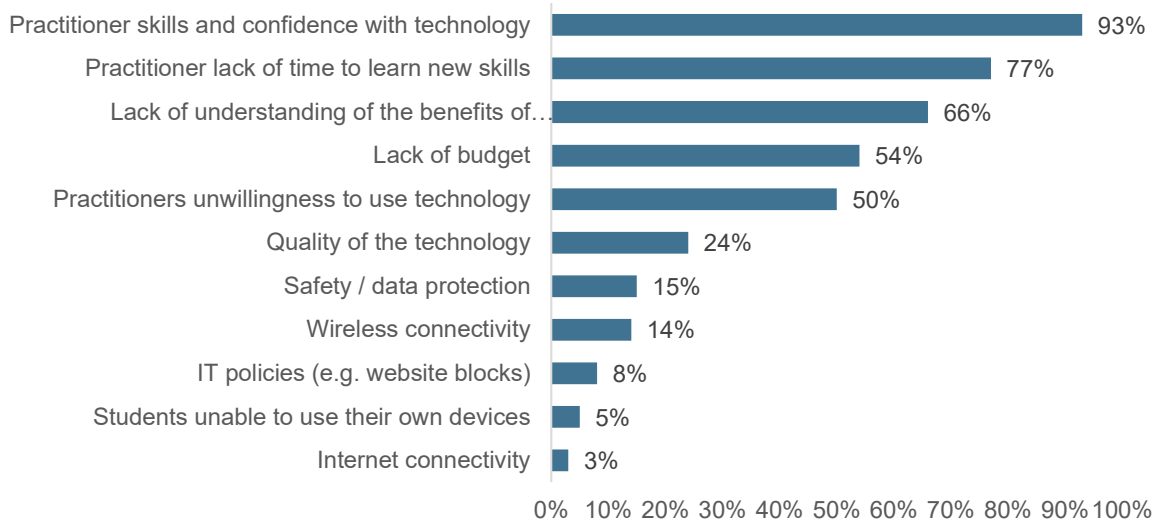
Remote learning[1] (1)

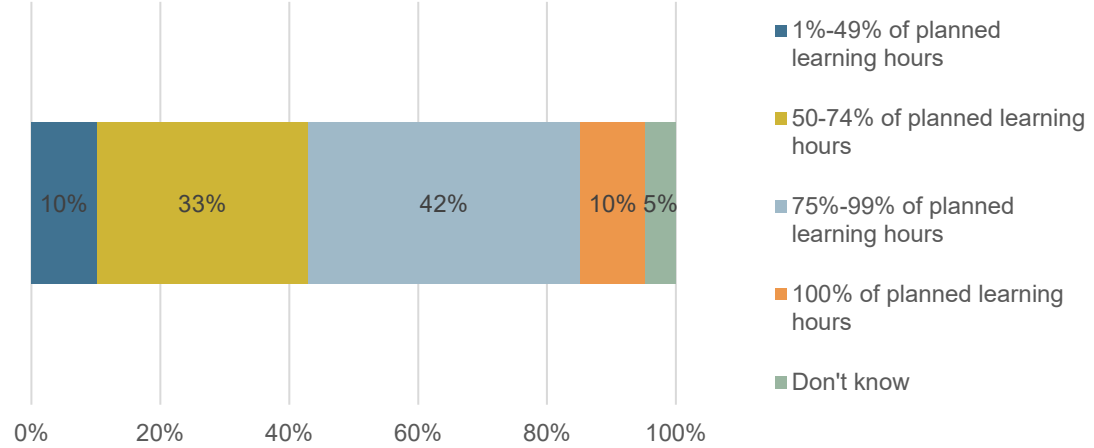
The crisis has exposed learner and provider barriers to remote learning

- Lockdown survey results show variation in learner engagement, with impacts likely to be larger on students undertaking practical learning, lower level learners or those with learning difficulties.
- Learners are undertook fewer hours of learning during the lockdown, which could negatively impact on their outcomes.
- FE learners may lack the confidence to engage with remote learning.[2] FE practitioners may lack the confidence to deliver remote education. The quality of digital content may vary.
- The balance between remote learning and face-to-face learning will depend on a range of factors over the coming months.

Main barriers in FE colleges making more use of education technology



Proportion of estimated planned learning hours being delivered remotely to 16-19 learners enrolled with FE colleges



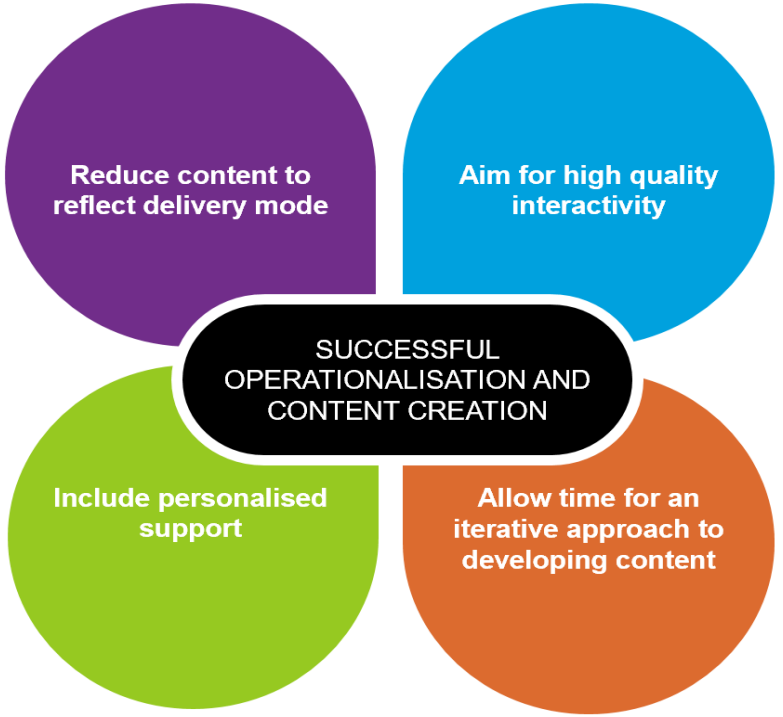
[1] FE Remote and online learning during the COVID-19 lockdown pack (surveys undertaken by the AoC and HOLEX in April 2020).
[2] This is likely to be particularly true for disadvantaged learners - who are more likely to participate in FE than other types of education.

Remote learning (2)

Pre-crisis, FE providers did not see the development of online learning as a priority

- Prior to COVID-19, analysis of online training indicated that current provisions are fragmented and only meet the needs of low-medium skilled adults to a limited extent.[1]
- Developing online provision wasn't a priority for most FE and HE providers.[2]
- Interim evaluation findings from DfE's Flexible Learning Fund show that developing high-quality online provision requires time and expertise.[3]
- Furthermore, engagement with providers suggests that pure online provision is less suitable for disadvantaged learners because they require more one-to-one support.[2]

The DfE Flexible Learning Fund is supporting providers to develop new ways of delivering flexible learning and to create 'golden rules' for designing and implementing high quality flexible (including online) courses.



Selected quotes:

- *"It just took a lot longer than expected. The whole thing was stressful for everyone involved and it meant it was all hands-on deck." Non-case study lead*
- *"We sat down…and went through what was essential to cover and what could be slimmed down. We used that information to know what we needed to convert into online content or videos." Lead, Wave 2*

[1] NRS online discovery report – UNPUBLISHED [2] DfE (2019) 'Review of the online learning and artificial intelligence education market'; https://www.gov.uk/government/publications/review-of-the-online-learning-and-artificial-intelligence-education-market
[3] Kantar (2020) 'Flexible Learning Fund interim findings' - UNPUBLISHED

Other considerations (1)

There are many other considerations not included in detail

- **Economic and education impacts of college closures** – FE learning leads to higher wages, greater chances of employment, and wider non-economic benefits (e.g. mental health). There are also employer benefits (i.e. more productive employees generate greater profits), Exchequer benefits (i.e. higher tax receipts and reduced benefit payments) and wider social benefits. There may be disproportionate impacts on vulnerable learners.
- **Working conditions, PPE, legal risks** – FE providers have to create a safe learning environment based on Government guidelines. For example, by sourcing their own PPE supplies, but it is unclear what the demand for PPE will be. Non-compliance (potentially organised by trade unions) could worsen potential FE workforce shortfalls. There are also legal risks if a provider is proved to not meet health and safety guidelines.
- **Link with employers** – apprenticeships are delivered mostly in employers. So, all working conditions and transport issues wouldn't only apply to the provider for these learners.[1]
- **FE estate capacity** – pre-crisis evidence suggested that there was scope for the overall FE estate to be rationalised further to drive efficiencies. However, we would need to know more about the likely COVID-19 secure m^2 requirements for learners in a range of scenarios to take this further.[2]

[1] This will also apply to T Levels, but they are only being rolled out this year and only in small numbers. [2] Of course, the FE workforce is an important interaction – just because you have space for the learners, doesn't mean that a teacher can teach them in different rooms at the same time

Other considerations (2)

There are many practicalities in minimising the number of interactions

- **Class sizes** – Higher level courses have larger class sizes[1] and subjects that require large workshops have somewhat smaller average class sizes.[2] A Level classes tend to be bigger in FECs and SFCs than in school sixth forms (~20 vs ~11 learners). For 19+ learners, the class size seemed to be determined more by workshop space (e.g. plumbing, hairdressing) than level (e.g. functional skills and ESOL had larger classes).
- **Combinations of learning** – Those taking A Levels are more likely be taking different combinations of learning, compared to more vocational courses (e.g. plumbing, hairdressing). This impacts the feasibility of bubbles.[3]
- **Furniture** – Tables may be designed for more than one person to sit at, so could break social distancing rules.
- **Cleaning** – Equipment, tables and classrooms (more generally) may need to be cleaned in between classes.
- **Regional considerations** – FE colleges tend to have less excess classroom capacity in inner cities, and the reliance on public transport is also higher in inner cities. Possible local lockdowns will also have an impact.
- **Compliance** – why measures are being taken and why it is safe for workforce and learners to return fully needs to be clear to maximise compliance.
- **Additional resource or funding** – for example, additional workload for workforce from additional tasks that will be needed or additional resources for mental health and wellbeing.
- **Other methods to minimise interactions** – timetabling, one way systems, rotas and bubbles. However, the feasibility of these different options vary hugely by type of learner, type of learning and type of provider.

[1] Due to pedagogical differences rather than amount of physical space needed. For example, entry/Level 1 courses (~11) vs Level 3 (~15) [2] For example, construction (~12) vs business admin (~15). [3] How many learners just do one course at a time or one after another compared to various courses concurrently, there is a potential policy around ensuring a break between courses (e.g. a week off before you can do the next course) to preserve the bubbles.

Annex: FE attendance by type of learning

FE learners spend very different amounts of time on site

- **16-19 learners** – 86% of 'post-16 technical learners' are on full time courses, vs 96% of 'post-16 academic'. Mean length of 'typical day at school/college' is 6-7 hours. Full-time post-16 learners in FE colleges, ITPs and school sixth forms spend the same amount of time in taught classes (15 hours per week).[1]
- **Apprenticeships** – legal requirement for all apprenticeships to include a minimum of 20% off-the-job training. However, only around half had received training at a college or external provider at any point in their apprenticeship. This varies by subject and age (e.g. 68% of 16-18 apprentices vs 37% of 25+ apprentices).[2] Based on unpublished interviews with apprenticeship providers FE colleges were much more likely to have their learners coming in one day a week; whereas ITPs were more likely to go to the employer's work site and provide distance learning.
- **Traineeships** – around ¼ go to a FE provider for their learning.[3]
- **Community learning** – courses are usually very short (e.g. less than 20 hours[4]), so learners probably don't spend a huge amount of time on site. However, these learners are less likely to be able to engage with remote learning.

[1] DfE (2020); Hours Spent Building Skills and Employability - UNPUBLISHED
[2] DfE (2020); Apprenticeships Evaluation 2018-19 – Learners; https://www.gov.uk/government/publications/apprenticeship-evaluation-2018-to-2019-learner-and-employer-surveys
[3] DfE (2017); Traineeships: Year Two Process Evaluation; https://www.gov.uk/government/publications/traineeships-evaluation; page 34
[4] BIS (2013); Community Learning Learner Survey Report; https://www.gov.uk/government/publications/community-learning-learner-survey-report-march-2013