

NHS Learning Accounts – the NHSU project

**Fiona Aldridge and Yanina Dutton
with Dilys Robinson and Nii Djan Tackey**



NHSU
learning for health
and social care

Undertaken by NIACE in partnership with IES for NHSU

1. Summary of recommendations

The Learning Account Adviser

1. Key skills and abilities (see pp.16-17) should be secured in the appointment of the Learning Adviser in order to ensure success.

Infrastructure

2. Where possible, project planning and infrastructure development activity should take place before the Learning Account Adviser is appointed.
3. The long-term sustainability of the work should be supported through embedded partnerships with other stakeholders, rather than being based on the efforts of particular individuals.
4. A project steering group should be established to provide ongoing direction to the activity.
5. The Learning Account Adviser should be provided with administrative support, to release them to focus on promoting learning and widening participation.
6. The temptation to work with everyone all at once should be avoided. Careful selection of trusts at an early stage can produce quick wins on which to build the work over time.

The NHSU Offer

7. Successful NHSU offer courses should be embedded into existing training and development structures.
8. Additional face-to-face support to supplement distance learning provision should be considered as a means of increasing motivation, improving retention rates, and in supporting a wider range of learners to succeed.
9. Skills for life assessment and support should be incorporated into all learning activities offered to NHS staff.

Marketing and promotion

10. Ongoing activities to raise awareness of the NHS Learning Account Scheme should be encouraged.
11. The NHS Learning Account Scheme would benefit from linking with larger promotional initiatives such as Adult Learners' Week.

12. Marketing and promotional material that shows how the Learning Accounts fit with other agendas, strategies and policies should be used to attract learners and demonstrate the 'added value' of the activity.
13. The use of learning champions should be adopted more widely as a means of encouraging new learners to participate.

Recruitment

14. The process of recruiting to, and beginning courses, should be made as easy as possible to avoid high attrition rates.
15. The pilots found it to be more difficult to recruit men, people from minority ethnic groups and individuals from certain occupations. Given the new public sector duty, from December 2006, to promote equality and diversity, further consideration should be given to engaging the 'hardest to reach'.

Monitoring and evaluation

16. A national system to monitor the NHS Learning Account Scheme should be developed and implemented. The LAM and CLAM systems may provide a useful basis for this, given their current widespread use.
17. Any system should incorporate a facility to record the outcomes and benefits of learning to the individual, organisation and patient
18. A longer-term evaluation of the benefits of the NHS Learning Account Scheme should also be commissioned to consider the full range of benefits of learning.

Fit with other policies, strategies, structures and initiatives

19. The guidance and resource pack, produced as part of this evaluation, should be extensively disseminated to support widening participation in NHS Learning Accounts.
20. Widening participation measures should be included within the Learning Account targets set for Strategic Health Authorities.
21. Funding for Learning Accounts should remain ring-fenced. This will ensure that money is not lost within mainstream training budgets, reducing opportunities for some groups of learners.
22. Greater investment in the recruitment and training of Union Learning Representatives will enable their potential contribution to promote wider participation in learning to be realised.
23. The contribution that the NHS Learning Account Scheme has to play in fulfilling other NHS policies and strategies should be made more explicit.

2. Introduction and background

The NHS Learning Account Scheme was introduced in April 2001 as part of a firm commitment in *The NHS Plan* to widen learning and development opportunities for staff who do not have a professional qualification. The Department of Health is responsible for overseeing the national framework within which the Scheme operates, with local administration and management being devolved to Strategic Health Authorities (SHAs). In April 2003, the Scheme was extended to include staff who work within the NHS but are employed by a private contractor, and staff working in social care who are employed by a partner organisation. The Scheme is currently funded until the end of March 2006.

Although the take up and use of NHS Learning Accounts has been very successful overall, information collected by the Department of Health indicates that some staff groups are benefiting more than others from the Scheme. For example, administrative and clerical staff have enjoyed greater access to NHS Learning Accounts than ancillary support staff or health care assistants. Staff who already have a qualification at level 2 have benefited to a greater extent than those with no previous qualifications. SHAs also report variability in Learning Account activity among trusts with some being more effective than others in using their full allocation of Learning Accounts. There are also indications that some trusts are using Learning Accounts to provide blocks of learning to relatively large numbers of people, rather than focussing on meeting the developmental needs of individual learners.

Given this evidence of variability of take-up, NHSU set up a pilot scheme with the aim of seeking practical ways of involving a wider range of staff in taking up their entitlement to an NHS Learning Account.

The NHSU pilot

Five pilots schemes were set up, in partnership with the local SHA, and involving local NHS employers and staff sides. Each pilot was designed to comprise:

- Targeted promotion of Learning Accounts to individuals and groups who have not taken up their entitlement
- An 'offer' of attractive learning programmes likely to interest the target group, give confidence in learning, and encourage further progression
- Advice and information through a dedicated Learning Account Adviser post jointly funded by NHSU and the SHA
- Direction to u-i for help and support on learning options
- Building local capacity by equipping managers and Union Learning Representatives (ULRs) to appreciate staff needs and how they can be met.

A key aim of the pilot is to open up progression routes to 'non-traditional' learners, leading to a better-trained workforce for the NHS as a whole, and an increased supply into professional training.

In line with local circumstances, each of the five areas has adopted different objectives and, to some extent, different approaches, within the overall framework of the pilot.

The NHSU offer

Three national learning providers have worked with the NHSU to offer a range of courses to meet individual needs.

- The Open University (OU) offered four courses of general interest, all of which can act as a stepping-stone to OU degree courses – *Understanding Society* (which replaced *Living in a Changing Society* from September 04), *Breakthrough to Mathematics, Science and Technology*, *Open to Change*, and *Understanding Children*.
- The Workers' Educational Association (WEA) and UNISON offered three courses of particular relevance to people who are returning to learning and progressing along a pathway towards professional qualifications – *Improve Your Study Skills*, *Learning for You* and *Pathways to the Future*.
- The National Extension College (NEC) offered two courses focusing on improving skills and confidence at work – *Introduction to Counselling Skills* and *Assertiveness at Work*.

The Evaluation

The aim of the evaluation, carried out on behalf of NHSU by the National Institute of Adult Continuing Education (NIACE) and the Institute for Employment Studies (IES), was to identify the elements necessary to ensure widespread and equal access to the NHS Learning Accounts Scheme. In particular, the evaluation team were asked to provide information on:

- The extent to which 'new' learners have been engaged in each of the pilot areas and to define the characteristics of these learners.
- The progression pathways of those taking up Learning Accounts because of the pilot.
- The elements of the pilots that have been successful in broadening access to Learning Accounts, for example:
 - Promotional activity and publicity material
 - U-i helpline
 - Support provided by the Learning Account Adviser
 - Context and delivery of learning programmes
 - Briefing/awareness raising of managers and union representatives.
- The benefits of the learning to the learner, their organisation and to the patient.
- The contribution towards other NHS strategies and policies, such as Agenda for Change and Skills for Life.
- The extent to which the project has contributed towards a sustainable expansion in capacity for the encouragement and support of 'non-traditional' learners and their take-up of Learning Accounts.
- The extent to which the full potential of working between NHSU partnerships, WDCs, SHAs, employers and staff side has been achieved in the preparation and implementation of the project.

Alongside this evaluation, ongoing discussion with WDCs, employers and staff side organisations is also seen as being essential to move towards agreement of future actions and roles. It is anticipated that dissemination of information about the pilots and their progress will heighten awareness about the operation of the Learning Accounts Scheme in WDCs/SHAs and amongst employers and staff.

The evaluation team were charged with:

- Production of an interim report for dissemination and consultation.
- Provision of input into an NHSU working conference held on the 2nd March 2005 to bring together a wide range of delegates to consult on the interim findings and shape the development of a guidance and resource pack.
- Production of a guidance and resource pack providing practical advice, relevant information, resources and suggestions for alternative approaches to those working to widen access in the take up of Learning Accounts.
- Production of this final evaluation report.

Methodology

In order to evaluate the NHSU project, the evaluation team were involved in:

- Scoping the research with project leads at NHSU.
- Attending a range of events and meetings associated with the pilot, including the project group and the operational management group at a national level, as well as those associated with individual pilots at a local level.
- Meetings with the NHSU Project Manager – Learning Accounts
- Analysis of documentary sources on the background and development of the pilots.
- Visits to each of the five pilot sites.
- Face-to-face and telephone interviews with a range of stakeholders in each of the pilots, including
 - SHA lead for the pilot
 - NHSU regional lead
 - Learning Account Adviser
 - Training managers
 - Managers of learners
 - Learners
 - And any other appropriate people such as tutors, representatives for WEA, OU, NEC, Union Learning Representatives (ULRs).
- Telephone interviews with two WDCs delivering Learning Accounts outside of the pilot.
- Discussions with the three education providers involved in the delivery of the NHSU offer – WEA, NEC and OU.
- Liaison with researchers at Manchester University.
- Collation of data arising from the pilot activity.

3. The pilot areas

Cheshire and Merseyside

Cheshire and Merseyside is one of the larger SHAs, in that it covers thirty-three trusts in total, of which the pilot operated in eleven. Prior to the pilot becoming operational, the SHA was managing to meet its overall Learning Account target although there was considerable variation in the contribution that individual trusts made to this. The SHA was therefore keen to use the pilot as a means of encouraging previously inactive trusts in their take up of Learning Accounts.

The Learning Account Adviser for Cheshire and Merseyside, Janine Reid, worked closely with the Greater Manchester Adviser, both of whom were managed by the same NHSU IAG co-ordinator. The position covered a wide range of tasks including promotion, sign-posting, alleviating barriers, confidence building, communications, raising self-esteem among potential learners and sales. Because little set-up activity had taken place before the Learning Account Adviser took up post, the pilot was initially slow in getting going. However, once contacts were identified, relationships built and administrative and other systems established, the pilot quickly gained momentum.

Enthusiasm for the pilot in general and the NHSU offer in particular was variable. For example, one trust embraced the offer fully, putting a lot of people through the offer courses, while others were less enthusiastic, preferring (for different reasons) the courses and providers already used by the trust. The most popular offer courses were the WEA *Improve your Study Skills* course and the NEC *Introduction to Counselling Skills* course. A range of programmes outside of the offer was also taken up including courses on deaf awareness, digital imaging, oral hygiene, and personal development, as well as the WEA *Working in Care* course.

To attract learners to the courses, the Cheshire and Merseyside and Greater Manchester Learning Account Advisers worked together to develop and distribute publicity materials. Posters and leaflets were widely used, as were other face-to-face and written marketing methods. Recruitment activities included representation at the Skills for Life Forum, drop-in sessions, lunchtime promotions, sign-up days, information sessions and attendance by the Learning Account adviser at learner representative and practice management forums.

Once learners were engaged with the pilot, support was given through course tutors, trust contacts and the Learning Account Adviser. The Learning Account Adviser provided general advice, assisted with enrolment, and referred people to the u-i helpline. In addition, a successful buddying system was set up to support learners on the OU *Understanding Society* course.

All of the stakeholders interviewed were concerned that NHS Learning Accounts should not be discontinued, as they are seen as an effective way of widening participation in learning to new staff groups. As a result of their learning, the target group experience huge gains in confidence and motivation, and often progress onto other learning activity such as NVQs and professional training. Learning Accounts

are therefore perceived as being a key element of the widening participation agenda, with several managers also making links to Agenda for Change, Key Skills Frameworks and *The NHS Plan*.

There was less concern about the pilot activity coming to an end, although several of those interviewed mentioned that offer courses were starting to gain in popularity and would need to continue. In addition, it was felt that apart from the pilot, Learning Accounts were mainly used by trusts to put on courses for a group of people or to send groups of people to tried and tested courses at colleges. Within the pilot, it was felt that offer courses were more tailored to the individual and their particular learning needs. The idea of introducing national monitoring and accountability systems for Learning Accounts was welcomed, as at present, practice varies considerably across different trusts and SHAs.

Data in relation to the take up of Learning Accounts prior to the pilot were difficult to obtain. Trusts tended to know how many people were undertaking NVQs and how many Learning Accounts had been used. Records had not been kept, however, on the type of staff using Learning Accounts, making it difficult to establish a baseline position from which to identify whether participation had been widened as a result of the pilot. During the pilot, the Learning Account Adviser has been able to collect a wide range of data, providing a baseline for future activity. In general, female staff members have showed more interest in the project, although given the gender profile of the NHS workforce a significant number of male security, manual and outreach workers have also participated.

Northumberland, Tyne & Wear and County Durham & Tees Valley

The North East pilot covers a large area, incorporating two Strategic Health Authorities – Northumberland Tyne & Wear SHA and County Durham & Tees Valley SHA. Northumberland Tyne & Wear SHA covers 14 trusts as well as being responsible for the North East Ambulance Service and the Prescription Pricing Authority. County Durham and Tees Valley, one of the smallest SHAs, covers 15 trusts. Both operate in areas that have pockets of acute economic and social deprivation, with high unemployment and extensive health problems.

The Northumberland Tyne & Wear SHA is already reputed to be one the most successful in terms of take up of NHS Learning Accounts. Involvement in the pilot was therefore initially seen as an opportunity to add value to existing work and to extend opportunities for those groups not currently accessing learning opportunities such as ancillary staff and community-based primary care staff. The pilot adopted an initial focus upon two Agenda for Change Early Implementer sites, although this was later broadened as reviews highlighted that these sites were unable to prioritise the pilot activity. As the project developed, it sought to focus on trusts that were more willing to work with the pilot and then act as champions for the work. Eleven trusts across the region have engaged with the pilot over its lifetime. One reason why some trusts have been reluctant to get involved with the pilot was their uncertainty about how they would continue to support and fund such learning opportunities if Learning Accounts are phased out or withdrawn.

Although it was originally estimated that the pilot would work with about 100 hard-to-reach individuals, an early decision was made not to focus on numbers, but rather on identifying and overcoming barriers to learning and meeting gaps in provision. Budget cuts in County Durham & Teesside accompanied by Northumberland, Tyne & Wear exceeding their national targets, contributed to reduced enthusiasm for the pilot within a number of trusts. Some trusts also expressed reluctance to ‘raise expectations of non-professional staff’ and to amend their existing training plans and budgets to fit the needs of the pilot.

On appointment, the Learning Account Adviser for Northumberland, Tyne & Wear and County Durham & Tees Valley, Leigh Marrs, found that some of the trusts in which she worked did not have an existing process for accessing Learning Accounts. Her role therefore required a consultancy element – working with managers, systems, procedures, and finance – before work with potential learners could begin. This work was essential; although it often resulted in a relatively small return in terms of take up of Learning Accounts for the time and effort invested. Towards the later stages of the pilot, the Learning Account Adviser also took on responsibility for NHSU Skills for Life work in the region. This combination of roles is thought to have enabled the pilot to identify and reach a greater proportion of non-traditional learners than it might have otherwise been able to do.

The NHSU offer courses were not considered by some trusts to be wholly appropriate for the groups targeted. While there have been a number of success stories of individuals whose lives have been transformed by learning, it is considered that opportunities of a more bite-size nature targeted at new learners would have been more suitable. Offer courses were recognised to be of quality but for some first time learners they were at too high a level (OU) or did not have enough support and direction for those not used to distance learning (NEC). In response to this, the Learning Account Adviser adopted a flexible approach by also promoting courses outside of the offer courses, evidenced by the recruitment figures showing an almost 50/50 split between take up of offer course and other courses.

Courses were marketed through the distribution of flyers, awareness raising sessions, open evenings, local advertising and through direct contact with staff, although it generally proved difficult to gain access to learners to promote the offer courses. Once enrolled on a course, support for learners was mainly provided through their course tutor. The Learning Account Adviser was also able to provide ongoing advice about further courses, although the late start of many courses resulted in few people requiring or benefiting from such support.

Despite some of the difficulties encountered in Northumberland, Tyne & Wear and County Durham & Tees Valley, the pilot proved beneficial in that it provided additional resources to raise awareness of learning opportunities; provided learners with access to information, advice and guidance and to the new offer courses; and identified particular organisations and staff groups where further work is required. The pilot also played an important role in raising awareness among some trusts about what learning is and why it is needed, challenging the notion that Learning Accounts can only be used to support organisation led learning opportunities such as ECDL.

Another key outcome was the development of the *Gateshead Trusts' ULR Plus* initiative, involving UNISON, WEA, NEC, OU and Care Connect, a partnership known as *Bridges to Learning*, and NHSU. This initiative aims to help trusts think about their use of ULRs and develop capacity to communicate the benefits of learning more effectively. Training activity in this area is beginning to show results with ULRs now actively recruiting learners. The ULRs have also formed their own network and have produced promotional materials for Adult Learners' Week. This initiative has been one of the major success stories of the Learning Account Pilot. It has forged partnerships, developed long term capacity and changed the culture of the organisations involved. The project is currently being evaluated and is already showing very positive results.

The two SHAs have different arrangements in place for record keeping and budget management. Coupled with the financial situation that many trusts in the region found themselves in during this year and the implementation of Agenda for Change, it was difficult for the Learning Adviser to obtain accurate information about the use of Learning Accounts or to what extent participation had widened as a result of the pilot. The largest group of beneficiaries appear to have been nurse cadets and modern apprentices. Learners have generally been young, in administrative and clerical jobs and from primary care trusts – all groups that have not accessed training in the past.

Greater Manchester

The Greater Manchester SHA covers 14 trusts and 14 PCTs, in addition to 10 social care areas. The SHA is also involved with the prison service, hospices and through social care, residential homes, nursing homes and voluntary agencies. Unsurprisingly, this broad spectrum of trusts also represents a broad range of cultures, particularly in their attitudes to learning.

The Greater Manchester pilot initially focussed on working with just five of their trusts. Three were selected because of their previous poor uptake of the Learning Accounts; one was selected specifically to widen participation beyond admin and clerical staff; and one was selected in part to widen access to groups beyond healthcare assistants and, in part, because of a history of contracted staff not accessing Learning Accounts. As the pilot developed, the work was extended to cover social care, the prison service and an additional mental health trust.

The Learning Account Adviser for Greater Manchester, Jackie Pratt, worked closely with the Adviser for Cheshire and Merseyside, both of whom were managed by the same NHSU IAG co-ordinator. As very little preparation work had been done in Greater Manchester prior to the Learning Account Adviser taking up post, it took a while for the project to get up and running. The Advisers' first tasks involved the development of a project plan, including budgets, timescales and a risk matrix, and the setting up of a steering group to share best practice, ideas and experience, shape the direction of the project, build and sustain provision after the end of the pilot activity and to build relationships. Only when this had been achieved, 3 months into the project, was it possible to begin the work of attracting and enrolling learners onto offer courses.

The main responsibility of the Adviser was to increase the take-up of Learning Accounts, and to widen participation through supporting non-traditional learners. As the pilot developed, the role of the Adviser therefore extended to also include attending management and networking meetings, general promotion of learning, running drop-in sessions, attending induction and providing ongoing support for learners. The Learning Account adviser also worked with the Greater Manchester Essential Skills Strategy Group to ensure that Skills for Life was adequately incorporated into the work of the pilot. Knowing how to use information and guidance techniques, being able to motivate people, having good interviewing and listening skills, and being able to reflect on what an individual wants are all seen to be key in successfully undertaking this role.

In total, eight trusts have fully engaged with the pilot. Where trusts did not see the relevance of the offer courses, work was undertaken to identify reasons why staff do not take up training and learning opportunities. Where trusts had little previous knowledge of Learning Accounts in general, work was undertaken to promote the Scheme through publicity materials and direct contact with staff. In general, prior to the pilot, poor take-up of Learning Accounts in trusts was found to occur where there was no identified person responsible for promoting the Learning Account Scheme, and where managers were not supportive of the Scheme. The Learning Account Adviser therefore played a key role in engaging managers to think of learning in terms of its role in national initiatives such as Improving Working Lives, Agenda for Change and the Knowledge and Skills Framework.

The most popular offer courses in the Greater Manchester pilot were the NEC *Counselling Skills* course, the WEA *Learning for You* course, and the Open University's *Breakthrough to Maths, Science and Technology* course. Because of difficulties around release time, distance-learning courses such as those provided by the OU and NEC proved to be particularly favoured by some groups of staff such as care assistants. The number of learners starting courses as a result of the pilot exceeded the initial target of 200. Learners came from a mix of occupational groups, many without qualifications and not having participated in learning since leaving full-time education.

A variety of methods have been used to market Learning Accounts in general and the offer courses in particular. These have included: attending managers meetings, displaying marketing materials such as flyers and posters; using display stands in staff canteens; organising Learning Account events where providers and unions are invited to attend; linking in with skills for life events; using learning lorries within Adult Learners' Week; and through direct contact with potential learners. The work with managers appears to have been most fruitful in terms of reaching new learners.

In order to ensure that enrolled learners are supported to succeed, considerable effort was made to ensure that learners understood what was being offered and what was expected of them at the outset. As a result, data showed that dropout rates were generally low, and informal feedback suggested high levels of satisfaction with courses. The Learning Account Adviser also offered ongoing information, advice and guidance. Learners were encouraged to contact her at any stage, she also dropped-in on courses being run within the trusts and attended the final sessions of the WEA

courses to offer further advice and guidance on potential next steps. Providers also provided positive support for learners, including feedback on assignments and providing specialist help for learners with learning needs such as dyslexia. The support provided by employers varied across the pilot. On the whole, managers appeared to support their staff by releasing them to attend courses or providing time to engage in distance learning. The Learning Account Adviser supported this through attending managers meetings and providing them with information about learning opportunities.

The main benefits identified by the SHA of participating in the project were the opportunity of having a dedicated person working with organisations in Greater Manchester, especially given the experience of widening participation that she was able to bring to the post; and, the availability of customised courses, reflecting the skill base required in the health and social care sector, delivered by reputable and recognisable providers. The relatively short-term nature of the commitment required for these courses also proved valuable in attracting new learners. In terms of impact, the pilot is seen to have raised the profile of learning and training opportunities among particular staff groups and provided them with a first opportunity to engage in such opportunities. Although time consuming, the initial investment in building sustainable relationships with trusts is considered to be one of the key success factors of the Greater Manchester pilot.

West Midlands South

During its lifetime, the West Midlands South pilot worked with 18 trusts and organisations across Hereford and Worcester, including acute trusts, PCTs, county council social care departments, a PFI private contractor (ISS Mediclean), the voluntary and community sector and a prison healthcare service at HMP Blakenhurst. Prior to the pilot taking place, the SHA was already meeting its overall Learning Account targets, but was interested in adding value to this by using the pilot as a framework to reach under-represented staff groups and organisations, specifically ancillary support staff, men, minority ethnic groups, PFI private contractor staff and staff working in social care.

Building on the lessons learned in the Shropshire and Staffordshire pilot already underway, the SHA sought to consult with key groups to canvass interest in the pilot. A Stakeholder Group was established in order to provide a framework and infrastructure in which the Learning Account Adviser would be able to operate, with a remit of ensuring widespread awareness of, and buy-in to, the pilot and to raise stakeholder awareness of their role in enabling the pilot to succeed. The SHA then top-sliced money from the Department of Health Allocation to form a Learning Account fund, which trusts could access for their staff participating in the pilot. This money was held by the Vocational Training Centre in Worcester who already had experience of managing the Learning Account budget for the area. The ring-fenced money and interest from the steering group meant that the Learning Account Adviser started in a position of most of the trusts already being aware of the pilot and having expressed an interest in participating.

As part of the NHSU project, the pilot committed itself to a target of reaching 200 learners, although the local Stakeholder Group also set a more ambitious objective of reaching and including a further 100 learners. The Stakeholder Group also set itself the aim of working with as many organisations and employers from across the whole of the health and social care economy as possible. From the start, embedding the lessons learnt from the project and ensuring future sustainability was a key project objective.

Because of the strength of existing procedures to support Learning Accounts in WM South, the Learning Account Advisers, Steve Akers and Wendy Gatfield have been able to easily bolt the work of the pilot onto this, enabling them to dedicate their time to nurturing stakeholder relationships and to promoting added value provision. In order to recruit learners onto offer courses, the Learning Account Advisers have marketed the pilot in three main ways: through existing structures such as user groups and manager's meetings; through personal relationships; and through printed materials. In addition to ongoing recruitment activities, 600 NHS Professionals staff received a direct mail shot advertising the offer courses that generated substantial interest and increased learner numbers.

The most popular courses with learners and training managers were the WEA *Improve Your Study Skills* and *Learning For You* courses; and the *Introducing Counselling Skills* and *Assertiveness at Work* courses from the NEC. There was some interest, but no eventual take-up of the OU Openings courses. One of the most innovative developments of the project involved grouping staff together, with supported release time from employers to meet-up at regular support sessions whilst undertaking the distance learning NEC courses. The structured course introduction and milestones served to give confidence and support to learners who had been out of formal learning for some considerable time, and it is anticipated that this model will continue to operate in WM South during 2005-06.

As awareness of the pilot increased, the number of participants also increased steadily. The majority of the learners would be considered 'hard to reach' as they had not recently done any learning outside of work, although some have completed NVQs. Learning Accounts have been accessed by health care assistants, nurse cadets, ancillary workers, social care support staff and volunteers. Mainly women have used the Accounts, although some men have also accessed them. Not many people from ethnic backgrounds have participated in the pilot, although this does reflect the local demographic profile. The short timeframe of the pilot has made it challenging to reach potential participants.

In developing and growing the existing workforce, the pilot is considered to have played an important role in working towards HR agendas in the NHS such as Agenda for Change. As it comes to an end, there is an intention to continue with the promotion of Learning Accounts, although with a greater emphasis on the role of training managers, as the role of the Learning Account Adviser is reduced. A final conference was also held to agree and put plans into place for embedding and sustaining best practice, taking the most popular offer courses into the future with all stakeholders engaged across the project.

At this conference learners were given the opportunity to speak about how the courses were benefiting them. Healthcare assistants undertaking the NEC *Introduction to Counselling Skills* course spoke powerfully of how the course was directly aiding their practice with clients in Acute Ward and clinical settings. Another successful learner at the Conference was a Theatre Support Worker from Herefordshire County Hospital who had completed the NEC Assertiveness at Work course. She spoke of how life transforming the course had been and of her plans to apply to become a Union Learning Representative for UNISON and spread the message about Learning Accounts and other opportunities for Lifelong Learning. Although much anecdotal evidence and personal testimonies are becoming available to support the difference that pilot has made in terms of increased confidence and knowledge among learners, it has not yet been possible to systematically record this evidence.

Shropshire and Staffordshire

The Shropshire and Staffordshire pilot differed from the other pilot areas in a number of ways, mainly influenced by the fact that it began its activity in October 2003 well ahead of the other pilots and was due to complete its work at the end of October 2004, just as the evaluation began. As a result it was not always possible to gain access to the same groups of people to interview as in the other pilot areas, although it did provide a useful and additional perspective to the work of the evaluation team.

Shropshire and Staffordshire WDC is comprised of 19 trusts, all of which initially signed up to be part of the pilot. Although most trusts within the WDC were doing quite well in achieving their Learning Account targets, there was a recognition that improvements could be made in widening access to previously under-represented staff groups. The main objectives of the pilot were therefore to increase the take-up of Learning Accounts in general; to increase the take up by under-represented groups; to foster multi-agency working to deliver opportunities for staff in health and social care; and to achieve this through the establishment of a sustainable infrastructure. Although the original intention was to engage with all 19 trusts, the ongoing review process revealed that this was too wide a remit, and highlighted the need for the pilot to concentrate instead on achieving early wins in a smaller number of trusts, and then roll out as the work developed.

The Learning Account Adviser for Staffordshire and Shropshire, Jean Ross, was engaged in a wide range of activities including building relationships with stakeholders, developing a project plan, identifying key staff groups to target, briefing and supporting trusts engaged in the pilot, developing publicity material, raising awareness and organising promotional activities for potential learners. Because this pilot did not run concurrently with the others, there was less opportunity for the Learning Account Adviser to share good practice with, and learn lessons from, her colleagues in similar positions across the wider project, although lessons from this pilot were incorporated into the West Midlands South pilot when it was later established.

In order to promote the work of the pilot, a wide range of publicity and marketing activity took place including high profile events during Adult Learner's Week in May 2004; trust briefings; taster sessions; staff restaurant visits; hospital trolley rounds;

presentations at conferences and team meetings; dissemination of information through the intranet, newsletters and leaflets; the organisation of staff forums and focus groups and direct contact with individual learners. A mail out organised through UNISON also generated considerable interest and enrolments. Direct contact was seen as being by far the most effective way of engaging hard to reach learners, and the Learning Account Adviser found it difficult to recruit in those trusts where she was not able to gain direct access to staff.

The trusts involved in the pilot chose not to adopt the promotional material developed by NHSU, instead preferring to develop and distribute their own. In excess of 13,000 leaflets were distributed in payslips with an additional 3,000 through learner events and trust displays. The Adviser also sought to consult with, and raise awareness among, staff through the use of focus groups designed to encourage particular staff groups to discuss issues around access to learning.

As a result of the promotional activity, a substantial number of potential learners made enquiries with the Learning Account Adviser, although many of these were in relation to ECDL, NVQs and Learning Accounts more generally rather than about the offer courses in particular. Enthusiasm for the offer courses varied and stakeholders would have liked to have seen a broader portfolio of learning opportunities that were more closely linked to the work of the staff groups who were being targeted.

In order to support retention and success within courses, the Learning Account Adviser offered a range of ongoing support to learners. This was particularly important for those engaged in distance learning who risked feeling isolated in their learning, and for new learners who were less confident in their ability to succeed. The Learning Account Adviser sought to access additional support for learners through ULRs. This did not become a reality within this pilot however, in part because not all of the trusts involved had fully established and trained ULRs, and in part because of the already heavy workload of ULRs.

Data on this pilot has been particularly hard to obtain, as the procedures for doing so were not firmly established until the NHSU Project Manager began work towards the end of the pilot. As a result, it has been difficult to assess the impact of this pilot. Anecdotal evidence suggests that the main benefits of the pilot were the raised levels of awareness and take up of learning opportunities among particular staff groups, and increased levels of self esteem among learners. The lessons learned in this pilot also proved to be immensely useful in establishing and developing the other pilot sites.

4. Themes and issues arising out of the evaluation

There is much to learn from the descriptions of each pilot area contained in the previous sections. There is also however, a number of cross cutting themes that emerge from the evaluation as a whole.

The Learning Account Adviser

Under the framework of the NHSU pilot, each of the five areas appointed a Learning Account Adviser; these were one-year posts, jointly funded by NHSU and the SHA.

The Learning Account Adviser role within the NHSU project was one of broker between the individual learner and the learning that was most appropriate for them, through a direct and personal relationship with the individual, placing the individual, rather than the organisation, in the forefront. A body of emerging work is beginning to emerge around the concept of 'brokerage'. which is seen to be able to make a distinctive contribution to widening adult participation by joining up a range of activities – outreach; information, advice and guidance (IAG); new courses, learners' support; and pathways for progression to employment or further learning¹.

The role of the Learning Account Adviser has been key to the success of the pilot in all five areas, acting as a broker in terms of:

- Networking with key local stakeholders as well as with Learning Account Advisers in other pilot areas.
- Actively promoting learning in a variety of ways including staff briefing sessions, taster events, distribution of posters and leaflets.
- Providing information about Learning Accounts to staff and managers.
- Signposting potential learners to appropriate courses and providers.
- Supporting potential learners through the application process, including negotiation with managers where required.
- Providing ongoing contact and support to learners throughout their courses.
- Signposting learners to further learning and progression pathways on completion of their initial learning activity.
- Keeping records and completing returns.

In order to ensure the right person was employed for the job, considerable time and effort was spent in designing an appropriate job description and person specification for each of the posts. Discussion with Learning Account Advisers, their managers and other local contacts suggested that the following skills and qualities were essential:

- High levels of self-motivation, drive, persistence and enthusiasm.
- Experience, or the ability to quickly acquire a good understanding, of the NHS and how it operates
- A commitment to the value of learning for all adults
- Empathy with learners and potential learners

¹ *Learning Brokerage: Building bridges between learners and providers*, Learning and Skills Research Centre, 2005

- Ability to provide impartial information, advice and guidance, rather than simply look for a quick sell
- Excellent communication skills that can be applied to a wide range of people from potential learners to managers and SHA employees
- The ability and willingness to keep up-to-date with developments related to course provision, content etc.
- The ability to plan and organise self and others
- Good levels of literacy, numeracy and IT skills
- Flexibility and responsiveness
- Accuracy and reliability
- Patience

Recommendation:

- Key skills and abilities should be secured in the appointment of the Learning Adviser in order to ensure success.

Infrastructure

For the work of a Learning Account Adviser to be as effective as possible, a number of issues needed to have been dealt with before they took up post. This was particularly the case in the NHSU project, where Advisers were only in post for 12 months and therefore needed to make the most of this time. While each of the pilot areas were encouraged to undertake a project planning exercise in advance of the Learning Account Adviser being appointed, limited resources in some areas meant that this was not possible and Advisers were required to carry out this work once appointed.

Pilot areas recommended that consideration be given to:

- The existing infrastructure to support the administration of Learning Accounts and how this may need to be developed
- Who is, and is not currently taking up Learning Accounts, and which priority groups of staff are to be engaged in learning through the work of the Adviser.
- The current availability of learning opportunities and how these might need to be extended to be attractive to potential learners while also contributing towards workforce development objectives
- Ensuring buy-in from key stakeholders. For example, one pilot formed a steering group of interested trusts to ensure they knew what the pilot was about and to explore how they could contribute to it. The trusts were then aware that more than a notional commitment was required. This ensured ‘buy-in’ to the pilot and helped the Adviser get started quickly.
- The management and working arrangements for the Learning Account Adviser, including the development of an agreed project plan.
- The practical working arrangements for the Adviser including provision of administrative support, financial procedures, office space and equipment, contact lists, recording systems etc.

One of the key lessons learned by several of the pilot areas was to focus initially on those trusts who were easier to work with in order to establish some quick wins, and to identify people to champion their cause. The involvement of other trusts could then be built in gradually as the work developed. This was illustrated by the experience of the Staffordshire and Shropshire pilot who initially sought to work with all trusts. Following a six-month review it was agreed to focus on a more limited number of trusts, and within each, specific groups of staff. This was a valuable lesson and an important pointer to the other pilots as they came on stream.

Recommendations:

- Where possible, project planning and infrastructure development activity should take place before the Learning Account Adviser is appointed.
- The long-term sustainability of the work should be supported through embedded partnerships with other stakeholders, rather than being based on the efforts of particular individuals.
- A project steering group should be established to provide ongoing direction to the activity.
- The Learning Account Adviser should be provided with administrative support, to release them to focus on promoting learning and widening participation.
- The temptation to work with everyone all at once should be avoided. Careful selection of trusts at an early stage can produce quick wins on which to build the work over time.

NHSU Offer

The core NHSU offer programmes were selected or developed following detailed discussion at national level between NHSU, Workforce Development Confederations (WDCs), trusts and Trade Unions. The programmes needed to be capable of delivery across all English SHA areas, and were required to incorporate the facility to progress to higher-level study. Where existing programmes were selected, it was felt that there was evidence of good quality and that they had been attractive to staff without a professional qualification. In some cases, programmes were enhanced or developed to meet the requirements of the project. For example, the delivery arrangements for the NEC programmes were amended to improve the level of tutor support.

In addition to the offer programmes, Learning Account Advisers had the autonomy to assist learners in finding an alternative course of study suitable to their needs. Some trusts compiled their own course calendar, available to staff, which aided this process. Local colleges and private training providers were also helpful in providing information, from which suitable choices could be made.

A balance between opportunities for group learning and supported distance learning was sought, resulting in the selection of nine offer courses some of which were

provided locally by the WEA and others which were available to be studied at a distance through the OU and NEC. The delivery of courses by reputable and recognisable providers supported the credibility of the project.

Views on the benefits of distance learning compared to locally run courses varied. For instance, in one pilot the majority of learners were engaged on WEA courses, with a small number of people doing the NEC assertiveness course. The counselling skills course was not popular, as a local course with face-to-face contact was deemed to be a better approach to learning about this issue. Most of the training managers involved in this pilot area were concerned about the practicalities and appropriateness of distance learning courses for the learners that they were trying to engage and were aware that support on the ground to supplement distance learning courses could make all the difference. Additional study sessions were arranged to provide participants with more structure and to ensure they completed the course within a suitable time frame. This approach proved very effective.

Most of the training managers involved in this pilot area were unsure about the practicalities and appropriateness of NEC distance learning courses for the learners that they were trying to engage. They felt the learners initially needed more structure and support than the courses provided and arranged for additional study sessions to be run to provide participants with more structure and to ensure they completed the course within a suitable time frame. In another area, however, the OUs Understanding Society and Understanding Children distance learning courses proved to be popular with individuals with domestic responsibilities and shift work, as they could study in their own hours. The Understanding Children course was particularly popular with older workers with grandchildren. Overall the distance learning courses worked well as they fitted into the learners' other commitments and interests, as well as their working hours.

Although it was always intended that partners could add in local courses if they wished to, a number of training managers from each of the pilot areas said that they would have liked other courses, or a wider range of courses, to be included as part of the offer, including some that were more focussed on the work that employees were currently engaged in. However, only a small number of managers refused to sign forms releasing employees onto Learning Account courses. Where appropriate Learning Account Advisers provided information and advice on other appropriate learning opportunities, and take up of these courses was recorded alongside take up of offer courses.

Some concern was expressed about the lack of assessment or support for learners with skills for life needs. However as a result of the collaboration developed through the NHSU project, the WEA and NEC are now developing a new version of the counselling skills course, combining face-to-face and distance learning methods and incorporating skills for life.

Backfill and release time were more of an issue in the pilot areas where more people were on WEA courses than where most people enrolled on OU courses. It was unclear whether this difference was related to the trust culture, managers' attitudes to the pilot, the learners' type of employment (whether it was easier to release some

people than others) or whether it was because of the release time required to do the courses. OU courses did not require release time as people completed them in their own time, whereas WEA courses often required release time.

Recommendations:

- Successful NHSU offer courses should be embedded into existing training and development structures.
- Additional face-to-face support to supplement distance learning provision should be considered as a means of increasing motivation, improving retention rates, and in supporting a wider range of learners to succeed.
- Skills for life assessment and support should be incorporated into all learning activities offered to NHS staff.

Marketing and promotion

Marketing and promotion of the NHSU project was often tailored to other NHS agendas and events. Briefings at meetings, presentations and targeting canteens were all found to be good ways of reaching potential learners. Word of mouth also worked well, although this took time to develop and see results, with learners often completing their course and then recommending it to other work colleagues.

The NHSU provided each pilot area with publicity materials and most of the Advisers used this material when it was available. However the NHSU project manager was able to allocate resources for the production of local materials, and two pilots chose to adopt this approach. Other pilots used a combination of locally produced material as well as the NHSU material. This included t-shirts, posters and information on payslips. It was not clear how accessible this material was to different groups of people, such as those with disabilities or literacy issues.

Recommendations:

- Ongoing activities to raise awareness of the NHS Learning Account Scheme should be encouraged.
- The NHS Learning Account Scheme would benefit from linking with larger promotional initiatives such as Adult Learners' Week.
- Marketing and promotional material that shows how the Learning Accounts fit with other agendas, strategies and policies should be used to attract learners and demonstrate the 'added value' of the activity.
- The use of learning champions should be adopted more widely as a means of encouraging new learners to participate.

Recruitment

Trends in recruitment onto particular courses varied across the pilot areas, with programme popularity often linked to targeted staff groups. For example, a high level of interest has been shown in the NEC *Counselling Skills* course by staff working in the voluntary and mental health sector. To the end of March 2005, 67 trusts and 778 learners have benefited from the NHSU project as shown below:

Table 1: Course enrolments						
	Northumberland Tyne & Wear and Durham & Tees Valley	Greater Manchester	Merseyside & Cheshire	West Midlands South	Staffordshire & Shropshire	Total
Open University						
Understanding Society	0	12	12	0	3	27
Breakthrough to Maths, Science and Technology	0	15	3	0	0	18
Open to Change	4	7	10	0	0	21
Understanding Children	4	6	14	0	1	25
Understanding Health (from June 05)	1	0	0	0	0	1
Workers Educational Association						
Improve Your Study Skills	5	25	52	79	12	173
Learning for You	0	31	0	15	0	46
Pathways to the Future	9	0	0	0	0	9
National Extension College						
Assertiveness at Work	8	22	12	32	0	74
Introduction to Counselling Skills	12	44	22	97	6	181
Other courses	49	68	83	3	0	178
Total enrolments	92	230	208	226	22	778

* Discrepancy of 23 between DCI figure (29.04.05) and available enrolment data to offer and other courses.

The Advisers were all confident about recruiting learners either face-to-face or through managers. Approaches included utilising meetings to talk to staff and managers and signing people up on an individual basis. Some Advisers spent more time working with groups than individuals to increase the awareness of the pilot and encourage individuals and managers of learners to take an interest and inform people who could benefit from the courses on offer. In one case, a group approach with different managers was considered to be a more effective way to reach a wide range of people in a limited time. Another Adviser felt they were more successful at signing

people when they went directly to them. The Advisers felt that recruitment was not as successful when they had to rely on managers and other people to pass on the information. Interest and commitment from managers, who acted as gatekeepers, was needed to reach some target groups. It often took time to attract potential learners, sometimes individuals would sign up for a course and not follow it through, while other individuals would take some time to sign up. The process of recruiting and beginning a course needs to be made as easy as possible for participants in order to avoid high attrition rates, with consideration needing to be given to practical factors (teaching venue, study time required) as well as personal ones.

Recommendations:

- The process of recruiting to, and beginning courses, should be made as easy as possible to avoid high attrition rates.
- The pilots found it to be more difficult to recruit men, people from minority ethnic groups and individuals from certain occupations. Given the new public sector duty, from December 2006, to promote equality and diversity, further consideration should be given to engaging the 'hardest to reach'.

Learner support

Learners received wide-ranging support and all of the learners interviewed felt well supported by at least a couple of other people. Learning Account Advisers provided support and assistance at the beginning and end of courses. They were also able to provide some support throughout the course, depending on their available time and whether the learners contacted them directly. The learners were given the Advisers contact details and were encouraged to contact them when necessary.

Learning Account Advisers and the three partner education providers sought to identify and meet Skills for Life needs. As a result of the pilot, the WEA and NEC are collaborating on further developing programmes that incorporate Skills for Life. Tutors and course participants also provided continual support, helping with initial assessments and providing encouragement when undertaking assignments.

There was a mix of feedback about support from learners' managers, sometimes related to whether or not managers had suggested the course through the appraisal system. Some managers were very interested in the courses their staff were engaged in, especially when they could see its benefits to the work they were currently doing. Where possible, the pilot attempted to involve supervisors and managers in briefing sessions so as to deliver sustainable improvements in the capacity to support learning.

None of the learners mentioned using the u-i helpline for support, and some did not know that it was there to help them throughout their course, despite Advisers promoting the helpline. The lack of use of the helpline within this project, however may in part be due to the extensive personal face-to-face support that learners were receiving from the Learning Account Adviser.

In some trusts, Union Learning Representatives were very active in encouraging individuals to take up their Learning Accounts, and in keeping in touch with learners on a day to day basis while on courses.

Some learners required a lot of support to be in place. To meet this need, one Learning Account Adviser started a buddy system for OU *Understanding Society* course to provide support and encourage completion of the course. Another training manager offered regular support for learners on the NEC distance learning assertive course. Both of these approaches create support mechanisms for the future although it will take time to see the full benefits of them for future courses.

Retention and progression

Retention rates for most courses were high, with no specific patterns emerging for particular courses or pilot areas. The extent of progression onto further learning and the effect the courses had on participants were usually anecdotal from training managers and Learning Account Advisers. There were many examples of people moving onto nursing courses, taking up other learning opportunities or moving on to support others in taking up learning opportunities. The examples given were encouraging, but no figures were available. Nor was there any systematic data to evidence that taking part in these learning courses helped retention rates within the hospital or helped learners progress to further study.

The WEA *Improve Your Study Skills* course was used in more than one pilot to bridge the link between health care assistants and nursing cadets completing their NVQ3 and going on to a nursing diploma/degree at university. It gave them the confidence and ability to shift from practical learning through their NVQ experience to more academic study techniques required for university. Previously these learners had experienced shorter, less in-depth courses than the WEA course offered. Training managers considered the shift to the WEA course to be a positive move for the participants. The course has now been accepted by University College Worcester to be included in their information pack as a good foundation for future students.

Another example of how the pilot supported learner progression was found among nursing assistants in Tameside and Glossop enrolled on the WEA *Learning for You* course. Most of the learners had not been engaged in any learning activity for the previous ten years, but found that the course provided them with a good foundation to progress into nurse training.

Benefits of learning

Many of the learners, managers of learners and other people interviewed talked about learners' gains in confidence, motivation, self-esteem and enthusiasm for learning. Lots of case studies were presented to illustrate this. For example, one learner had found her assertiveness course to be 'life changing' in her private life as well as at work and now wanted to help other people doing the same course.

Mixed responses were received in relation to the difference that courses have made to people's day-to-day work, and it can take time for any impact on an individuals'

performance at work to emerge. While there have generally been high retention rates and there is some evidence of progression, there is currently a lack of robust data to support the case for the organisational benefits of Learning Accounts. In part this is because of the short timescale of the project evaluation, and in part because records have not been pulled together and in some cases evidenced sufficiently. It would be beneficial to develop these figures and data to explore the benefits to their work and own personal and employment development.

It is difficult to prove that organisations with a learning culture and a commitment to widening participation in learning perform better than those who do not, as so many confounding variables can get in the way. However, several studies by IES add to the growing body of evidence that supports the benefit of a learning culture. For example, IES research into employee engagement (in the NHS and elsewhere) shows clearly that a positive attitude by employees towards training and development, and positive experiences of this aspect of working life, constitute a key driver of employee engagement. This has organisational benefits, in that employees who are engaged are more likely to work harder, less likely to be absent and more likely to stay within the organisation.

Monitoring and evaluation

At present, SHAs often collect different information in different ways as part of their administration of the NHS Learning Account Scheme. As a result it is difficult to present a national picture of the extent to which particular staff groups take up these opportunities, and to examine whether targeted initiatives are successful in widening participation.

As part of the project, the NHSU therefore established a set of systems for collecting relevant data across all of the pilot areas including:

- The number and range of trusts and organisation involved.
- The work undertaken to promote awareness of the pilot and recruit potential learners.
- The number of staff signed up for courses and course details.
- The participating staff characteristics and occupations.

The lack of extensive data collected by trusts and SHAs in previous years has made it difficult to identify whether, and to what extent, the take up of Learning Accounts has truly been widened as a result of the project. This pilot year may therefore need to be seen as a baseline from which to measure future developments.

Although record-keeping was found by some of the Advisers to be a very time-consuming activity, it is of course invaluable in evidencing widening participation in the take up of Learning Accounts. Where possible therefore, data collection should be as streamlined as possible, and efforts should be made to co-ordinate the monitoring needs of different stakeholders in order to avoid duplication.

The most significant data gap arising from the pilot activity was in relation to the outcomes and benefits of participation in learning. WEA course participants all completed evaluation forms at the end of their course, and OU and NEC also have

evaluation forms. However, it is unclear from these documents what the full range of benefits are to learners, trusts and other organisations, and to patients. In part, this is due to the time that it can take for learning to result in benefits such as educational progression or improved retention rates at work. However in part, it is also because of the notorious difficulty of capturing this information in a systematic way. Although systems for collecting data have greatly improved as the project has developed, it has proved problematic to capture all of the data that may be of use in evidencing the full range of benefits that widening participation in Learning Accounts can achieve.

Success measures for the individual could include: returning to learning, career or educational progression, increased receptivity to change, increased confidence and self-esteem, influence on colleagues, and personal fulfilment. Success measure for the organisation could include: improved recruitment and retention, reduced sickness absence, higher levels of staff satisfaction, higher levels of service delivery, improved performance indicators, and organisational development.

Recommendations:

- A national system to monitor the NHS Learning Account Scheme should be developed and implemented. The LAM and CLAM systems may provide a useful basis for this, given their current widespread use.
- Any system should incorporate a facility to record the outcomes and benefits of learning to the individual, organisation and patient .
- A longer-term evaluation of the benefits of the NHS Learning Account Scheme should also be commissioned to consider the full range of benefits of learning.

Fit with other policies, strategies, structures and initiatives

One of the aims and achievements of the NHSU project was to raise awareness of the **NHS Learning Account Scheme**. This was achieved through a range of marketing and promotional strategies that sought to combine the promotion of the Scheme alongside the promotion of the NHSU offer courses and the additional support available through the pilot. Learning Account Advisers generally found that awareness of the NHS Learning Account Scheme was patchy among many of the groups they were seeking to target, and often encountered confusion among potential learners as to who was entitled to an Account and how they could be used.

The use of Learning Accounts within the NHSU project tended to differ from that adopted more generally across the NHS scheme in a number of ways, which sometimes led to additional confusion among potential learners:

- Firstly, Learning Accounts are generally used to fund practical courses, such as stress management, ECDL and foreign languages. The NHSU offer courses however, were more focussed on self-development and on hooking people into an initial interest in learning.
- Secondly, in many trusts there is a tendency for Learning Account funding to be spent at an organisational level in making block bookings for particular courses,

for which it then identifies staff to attend. In contrast the NHSU project was concerned with making resources available to individuals to pursue their own learning.

Many NHS staff remain unaware of the Learning Account Scheme. The NHSU project therefore sought to target groups and individuals who had not previously benefited and some staff were therefore initially wary of the projects pro-active approach to including non-professional staff in development opportunities. However, as awareness of NHS Learning Accounts grew, greater levels of enthusiasm for the project and the Scheme more generally have also grown, accompanied by concerns that if the ring-fenced funding for Learning Accounts were to cease, then these monies would disappear into general training budgets and be unavailable for non-professional staff.

Several interviewees suggested that SHAs be encouraged to include widening participation measures in their business planning as well as targets for overall take-up of Learning Accounts. The lack of incentive to widen participation in the current system means that some trusts, particularly those meeting their current targets, felt they had no need for the project. The introduction of a widening participation measure would ensure that this issue becomes a greater priority for trusts and other organisations.

The evaluation found that although Learning Account Advisers frequently recommended the **u-i helpline** to learners, it was not in a strong position to support this activity. A 'mystery shop' of the helpline near the beginning of the project to see how appropriate it was for the learners being targeted, found that the helpline staff were unaware of the project. Further dedicated training for u-i Advisers on the Learning Account Scheme and the NHSU project followed, although Learning Account Advisers did not rely strongly on the helpline to support their learners. The lack of use of the helpline within this project, however may in part be due to the extensive personal face-to-face support that learners were receiving from the Learning Account Adviser.

Trade Unions were involved in the NHSU project in a number of ways. At a national level in setting up and developing the project and participating in the project reference group; in circulating information about the NHSU project, the opportunities offered and how to take them up, to its individual members in Shropshire and Staffordshire and West Midlands South; and through a number of pilot areas working with **Union Learning Representatives**. The use of ULRs was found to be particularly successful in the Northumberland, Tyne & Wear and County Durham & Tees Valley pilot, however in the Manchester pilot, ULRs were only active in one of the trusts and even here were unable to offer support to the pilot as they were fully occupied with Agenda for Change. Thus although ULRs have the potential to be an excellent form of support, they were sometimes inactive even when trained, were too few in number, and lacked co-ordination.

All of the Learning Account Advisers were aware of the **skills for life** agenda and where possible, worked to support learners to find suitable programmes of study to meet their individual needs. Some initial concern was expressed about the lack of assessment or support for learners with skills for life needs. However as a result of the collaboration developed through the NHSU project, the WEA and NEC are now developing a new version of the *Counselling Skills* course, combining face-to-face and distance learning methods and incorporating skills for life. Tutors and course participants also provided continual support, helping with initial assessments and providing encouragement when undertaking assignments. An example of the how synergy developed between the NHSU project and the skills for life agenda is demonstrated in the Greater Manchester pilot where the Learning Account Adviser become part of the Greater Manchester Essential Skills Strategy Group, and will continue this work after the completion of the NHSU project.

When interviewed, SHA staff and NHSU leads often referred to how the NHSU project sat alongside and contributed towards **other NHS strategies and policies**. Interviewees from a number of trusts also made the link between work taking place in the pilots and strategies such as Agenda for Change, the Skills Escalator, and KSF. However learners and staff with less strategic roles often failed to see the link. One of the key roles of the Learning Account Advisers was to assist managers to see how the pilot activity linked into other strategies in order to help them appreciate the organisational value of encouraging their staff to participate.

Recommendations:

- The guidance and resource pack, produced as part of this evaluation, should be extensively disseminated to support widening participation in NHS Learning Accounts.
- Widening participation measures should be included within the Learning Account targets set for Strategic Health Authorities.
- Funding for Learning Accounts should remain ring-fenced. This will ensure that money is not lost within mainstream training budgets, reducing opportunities for some groups of learners.
- Greater investment in the recruitment and training of Union Learning Representatives will enable their potential contribution to promote wider participation in learning to be realised.
- The contribution that the NHS Learning Account Scheme has to play in fulfilling other NHS policies and strategies should be made more explicit.