



# Invest in adult learning

Executive summary of the outcomes of the  
FinALE project



## Introduction

In the context of demographic change and increasingly complex needs of society, adult education is a crucial instrument for promoting social cohesion. However, adult learning is often underfunded, compared to other sectors of the education system.

More often than not, adult learning throughout Europe faces the challenge to secure its financing, and, where possible, improve it. However, we know too little about funding tools and how to invest in order to get the best results. There is a need for better foundations for decision-making in financing adult learning.

The FinALE project brings together organisations from eight European countries. Over a period of two years, they have analysed existing funding opportunities and developed recommendations for ensuring sustainable funding in the future.

This Executive Summary presents recommendations as well as the main findings of the project as to why, how and where to invest in adult learning.

# Recommendations

The analysis of the FinALE project has resulted in nine recommendations for policy-makers, funders, adult educators and researchers.

## 1. Adult learning is an investment



Think of adult learning as an investment. Adult learning has a range of benefits not only for the individual, but also for society, the economy, and democracies. The benefits include positive effects on income and employability, health, civic commitment, reduced criminal activity, among others.

## 2. Carefully analyse the ‘what’ and ‘how’s



The complexity of adult learning’s benefits makes them hard to measure. Using indicators is one way to measure them on an aggregated level, but it can also be imprecise, as the example below shows.

*A simple, but quite common indicator is whether participants enrolled in a course have found a job within a certain period upon completion. Now let’s assume that a young woman from a disadvantaged background with low basic skills has taken part in such a course, but after the indicated period, she still has not found a job. The outcome based on this individual result is therefore negative, and if this is the case for a larger number of course participants, the funding for the course might be cut.*

*What this one indicator does not cover is the fact that she might*

- have become a more confident and better parent;*
- have continued her learning;*
- have signed up for a library card and is now reading and using a computer regularly;*
- have signed up with a doctor and is more aware of her and her family’s health;*
- have started volunteering (which will eventually lead to an employment);*
- have become a more positive, confident and content person.*

The project therefore recommends avoiding single outcome indicators in order to understand the return on investment. Instead, the project suggests using what is called the ‘sequential mixed-methods research’ consisting of a large scale survey among participants followed up by qualitative interviews. This will help capture the complexity of outcomes.

### 3. Pledge for more sustainability and continuity



Adult education is prone to ‘stop and go’ policies and short-term funding. The project recommends more sustainability and continuity of funding to ensure the feasibility of the work of adult learning organisations and providers and their ability to innovate and develop within the field.

### 4. Ensure less bureaucracy



The diversity of the adult education sector is huge. Some organisations are rather big and professional others are small and run by volunteers. The project recommends less bureaucracy and a balanced relation between the received funds and required bureaucracy.

### 5. Incorporate a more comprehensive and consistent approach



Many adult learning organisations are forced to use different sources and types of funding, hence the need to provide both courses with a participation fee and others free of charge. This creates hierarchy, causes additional bureaucracy and the risk of friction between learners. Also, providers are subject to competition over scarce funding. The project recommends a more comprehensive and consistent approach to funding adult learning.

### 6. Enable better cooperation between funders and beneficiaries



The motives of adult education funders and those of their beneficiaries do not always correspond. The project recommends developing cooperative and civil dialogue structures between adult education providers and learners that can drive not only the funding, but also general strategies for adult education in the relevant country, region or commune.

## 7. Recognise and finance all forms adult learning



ADULT  
LEARNING

Due to austerity measures and governmental changes, many European countries have reduced or shifted their support for adult learning. Although formal, vocational and basic skills provision have been prioritised, more general education and democracy education, hand craft, health related and leisure time courses etc. are also valuable. The project therefore recommends recognising and financing all forms of adult learning.

## 8. Think differently: From outcome-based to needs-based approach



Current funding mechanisms are characterised by an outcome-based approach focusing on pre-determined outputs. But in order to achieve a 'Learning Europe' and attract more and new learners, we might have to start thinking differently. The project recommends a more needs-based approach focusing on the needs and interests of the learner.

## 9. More research and knowledge



This small project has demonstrated that the issue of financing adult education is very complex. We still have too little knowledge about the overall investment in adult learning. The project recommends more research and cooperation among experts in the field of funding for adult learning. Specifically, we suggest repeating the BeLL study for acquiring current and more updated data. Also, the project recommends using the framework of the BeLL project in more countries in order to gain more comprehensive data in the field and be able to widen the possibilities of comparison.



An investment in adult learning is an investment in people. Several quantitative and qualitative studies have shown wider benefits of adult learning for both the learners as individuals as well as for the economy and for society as a whole.

#### **Adult education benefits individuals by**

- Increasing their employability, thereby leading to monetary effects;
- Increasing their well-being in terms of better mental and physical health;
- Increasing their self-confidence;
- Providing social benefits such as an increased social circle and civic commitment;
- Improving personal and interpersonal capabilities, such as self-esteem and empathy.

#### **Adult education benefits the economy by**

- Increasing innovative capacity;
- Improving competitiveness through increased productivity and innovation;
- Encouraging growth due to increased employment and innovative capabilities;
- Allowing an increase in tax payments.

#### **Adult education benefits society by**

- Improving health of the population;
- Reducing criminal activity;
- Increasing sustainability and preservation of environment;
- Promoting social cohesion and respect;
- Reinforcing social/political outlook, thus development of democracy;
- Increasing active citizenship;
- Increasing cultural integration.

All of these effects can be measured using indicators such as reduced health costs, reduced crime rates etc. However, this is an indirect way of measuring and also costly as it requires a very large set of indicators. A more direct way of measuring on a micro level is using individual questionnaires and interviews as was done in the BeLL project. The benefits of adult learning seems to exceed the effects of initial education. The transfer of learning outcomes obtained from adult learning is more direct and also quicker than in initial education and training. Non-formal adult learning in particular can react (adapt) very quickly to new requirements.

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**Teresa** is 66 years old. She participated in courses in Information and Communication technology (ICT). This increased her motivation to learn and improved her social skills as well as the quality of her life overall. Her health benefits were particularly visible: she got access to better information on health issues through being able to use the internet and search for relevant information, book doctors' appointments online etc

**John** is a divorced man, in his 40s, with 2 children. He was an office clerk in a big company and was given the opportunity to take up learning. Through that, he discovered his creative skills and took a training to become a carpenter, after which he got a job in this profession. This gave a boost to his self-confidence, which benefited his relationship with his children as he felt more balanced. Now he is healthier because his work requires him to move. Also, he has a new girlfriend and has become more confident approaching new people.

**Rosa** is 35-year old woman. She completed a florist course. This increased her self-esteem, leading to a more active contribution to her community and encouraging her to start her own business.

**Mustapha**, from Syria, took a Portuguese language course which helped him expand his network of contacts, acquire new skills and competences and integrate better into his host society. It also led him to apply for Portuguese nationality, vote, participate in political life, have his school and professional competences recognised as well as fulfill the requirements he needed to start a new business.

# How to invest in adult learning

The project has identified 11 different funding tools used in non-formal adult learning:

## SUPPLY-SIDE: FUNDING OF PROVIDERS

- 1. Programme funding:** *A provider accepts a contract by a public authority to provide a range of courses.*
- 2. Project funding:** *A funder gives a contract to providers for a specific service, such as delivering learning, developing new courses or reaching out to particular types of learners.*
- 3. Formula funding:** *A standard amount paid to providers to achieve a specified outcome. The funding is based on the number of teaching hours, student enrolment or programme completion rates.*
- 4. Philanthropic funding:** *A philanthropic agency provides a grant for the provider. This can be project-based funding or more long-term/structural funding.*
- 5. Learners' fee:** *Fees from learners that partly or entirely fund the provider and delivery of training.*

## DEMAND-SIDE: FUNDING OF LEARNERS OR EMPLOYERS

- 6. Tax incentive:** *A taxation rule which allocates financial benefits to taxpayers who participate in learning.*
- 7. Direct grants:** *Subsidy to support the individual's or company's investment in learning.*
- 8. Vouchers/individual learning accounts:** *A subsidy (in the form of a monetary coupon) which enables individuals or companies to access learning.*
- 9. Loans:** *Schemes allowing people to borrow against their future income to cover training costs.*
- 10. Training leave:** *A regulatory instrument that seeks equitable access to education by granting leave to employees for learning purposes.*
- 11. Payback clauses:** *Repayment of training costs to the funding employer, if the employee decides voluntarily to discontinue the employment relationship.*

By asking the providers, as was done in the FinALE survey, programme funding was identified as most relevant, followed by learners' fees and project funding. These are also the most commonly used funding tools together with direct grants.



When looking at the figures on overall spending on adult education and the main funding sources, learners' fees play a major role for the financing of adult education providers, whereas programme funding is seen as the primary source of funding of non-formal adult learning according to the FinALE survey. Depending on the political and economic target as well as the definition of the target group(s), funding tools have their specific advantages and disadvantages. While programme funding supports training programmes and their administration/ management, and funding-wise is more sustainable, project funding usually focuses on short-term training / courses for a specific target group. Learners' fees are a central funding tool for adult education provision, however, they might exclude groups with lower purchase power from access to adult education, particularly where learners' fees cover a large part of the costs of courses.

The FinALE survey shows mixed opinions among providers about the efficiency of the funding tools used. This counts for the usefulness, the administration, the effectiveness of reaching target groups and for balancing responsibility of learning activities between governments, employers, individuals (learners) or other stakeholders. This calls for improved dialogue between policy makers and providers.

To ensure fruitful return on investment in adult learning, funding ought to be sufficient, efficient, effective, sustainable and support quality development. In order to analyse and measure the funding system and the performance of the adult learning system, the project has developed an indicator-based approach:

<b>System Performance</b>	<b>Indicator</b>	<b>Potential data source</b>
<i>Investment in adult education</i>	<i>% of GDP invested in AE</i>	<i>Governmental estimates</i>
<i>Efficiency</i>	<i>Cost per learning hour</i>	<i>Provider estimates</i>
<i>Effectiveness</i>	<i>Return on Investment</i>	<i>Stakeholder estimates</i>
<i>Quality of staff</i>	<i>% of AE budget invested in staff development</i>	<i>Provider estimates</i>
<i>Quality of programmes</i>	<i>% of AE budget invested in course development</i>	<i>Provider estimates</i>
<i>Sustainability</i>	<i>% of AE budget invested by individual/non-public sources</i>	<i>Provider estimates</i>

# Where to learn more

This Executive Summary is only an extract of the main findings of the project. For the full description of the FinALE project as well as access to all of the reports of the project, please visit the project website

[www.financing-adult-learning.eu](http://www.financing-adult-learning.eu)

For further information on the nine project partners, please visit the organisations' websites:

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## **EAEA - Belgium (Lead) - [www.eaea.org](http://www.eaea.org)**

The European Association for the Education of Adults (EAEA) is the voice of non-formal adult education in Europe. EAEA is a European NGO with 142 member organisations in 44 countries and represents more than 60 million learners Europe-wide.

## **AONTAS - Ireland - [www.aontas.com](http://www.aontas.com)**

AONTAS is the Irish National Adult Learning Organisation which advocates for the right of adult learners. It is a membership organisation open to those interested in the promotion or advancement of adult education.

## **DAEA - Denmark - [www.daea.dk](http://www.daea.dk)**

Danish Adult Education Association (DAEA) is the umbrella organisation of 35 nationwide member organisations within non-formal and informal adult learning in Denmark.

## **EARLALL - Belgium - [www.earlall.eu](http://www.earlall.eu)**

The European Association of Regional and Local Authorities for Lifelong Learning (EARLALL) is an organisation that works to increase and highlight the role of regions and local authorities in planning and implementing lifelong

## **NBEB - Germany - [www.nbeb.de](http://www.nbeb.de)**

Niedersächsischer Bund für freie Erwachsenenbildung e.V. (nbeb) is the Lower Saxony League for Liberal Adult Education, an umbrella organisation of publicly co-funded adult education providers in Lower Saxony, aggregating 9 member institutions with 180 offices in Lower Saxony.

## ILC - UK - [www.individuallearning.co.uk](http://www.individuallearning.co.uk)

Formerly part of a regional public funding authority, the Individual Learning Company (ILC) was established as a not for profit organisation to support development of public education and training initiatives.

## KERIGMA - Portugal - [www.kerigma.pt](http://www.kerigma.pt)

Kerigma is the Institute of Innovation and Social Development of Barcelos, a non-profit organization, focused on adult learning and social development.

## SVEB - Switzerland - [www.alice.ch](http://www.alice.ch)

The Swiss Federation for Adult Learning (SVEB) is the umbrella organisation for general and vocational adult learning. SVEB groups over 700 members.

## VOEV - Austria - [www.vhs.or.at](http://www.vhs.or.at)

The Austrian Association for Adult Education represents 270 Adult Education Centres



EUROPEAN ASSOCIATION FOR  
THE EDUCATION OF ADULTS



Danish  
Adult  
Education  
Association



**earll**  
EUROPEAN ASSOCIATION OF REGIONAL & LOCAL  
AUTHORITIES FOR LIFELONG LEARNING



NIEDERSÄCHSISCHER BUND  
FÜR FREIE  
ERWACHSENENBILDUNG E.V.



KERIGMA

S V E B ■ Schweizerischer Verband für Weiterbildung  
F é d é r a t i o n s u i s s e p o u r l a f o r m a t i o n c o n t i n u e  
F S E A ■ Federazione Svizzera per la formazione continua  
S w i s s F e d e r a t i o n f o r A d u l t L e a r n i n g



Verband Österreichischer  
Volkshochschulen

## The BeLL project - Benefits of Lifelong Learning

We also recommend the BeLL project, which is a comprehensive study of the Benefits of Lifelong Learning to learners and society. For further information, please visit the BeLL website: <http://www.bell-project.eu/>



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