

# LEARNING WITHOUT WALLS

A STRATEGY FOR FUNDING 2015-2020



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22%

OF VACANCIES WITHIN  
ENGLAND ARE PROVING  
DIFFICULT TO FILL DUE  
TO SKILLS-SHORTAGES\*

# Introduction

Ufi Charitable Trust has developed a five year funding strategy in consultation with Trustees, staff and supporters. This document sets out:

1

Our vision

2

The context in which we are working

3

Our funding priorities

4

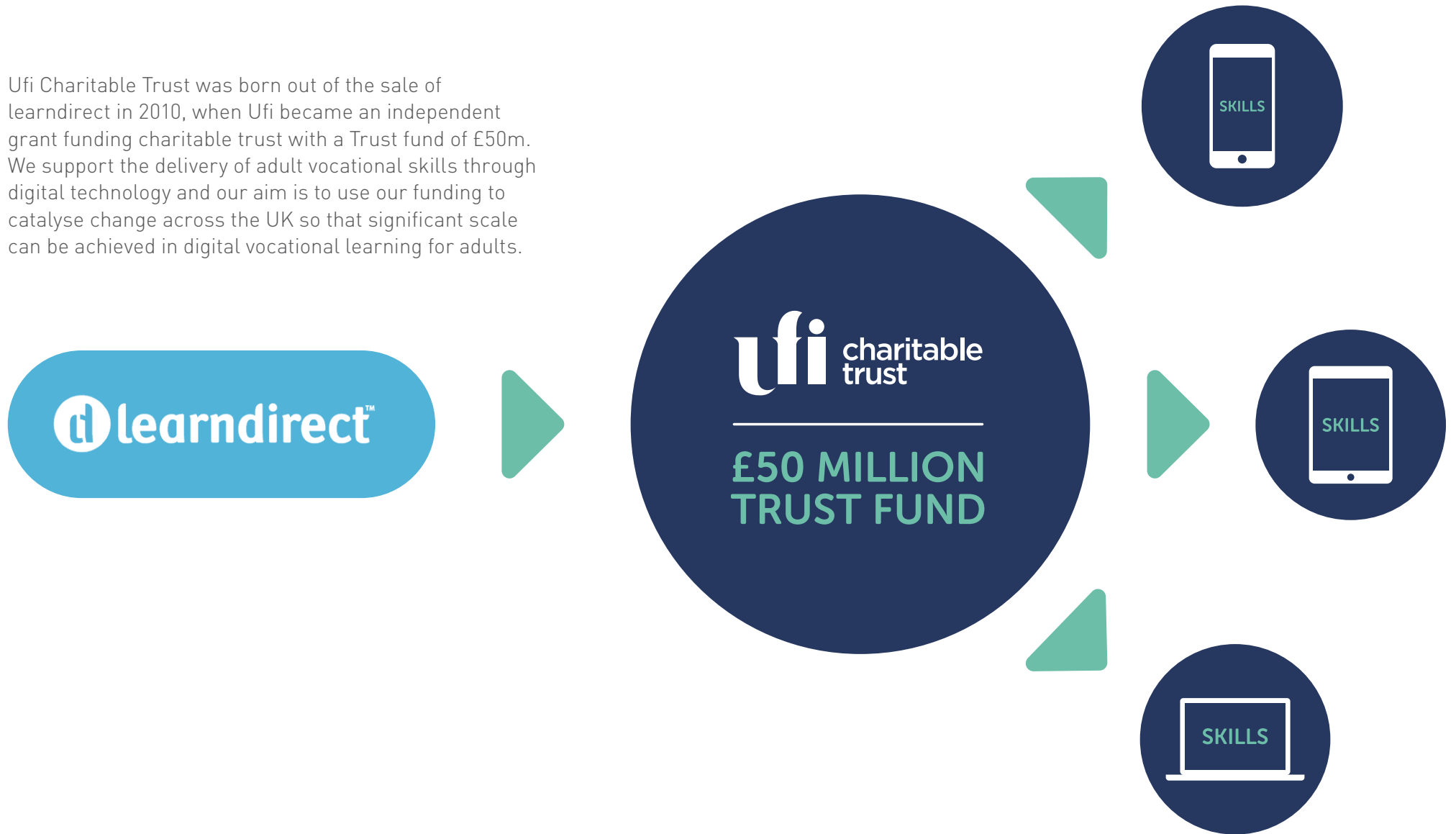
Our approach to learning as an organisation

5

How to apply for our funding

# Who are Ufi

Ufi Charitable Trust was born out of the sale of learndirect in 2010, when Ufi became an independent grant funding charitable trust with a Trust fund of £50m. We support the delivery of adult vocational skills through digital technology and our aim is to use our funding to catalyse change across the UK so that significant scale can be achieved in digital vocational learning for adults.





# Our Vision

We believe that the UK needs to accelerate the number of people accessing learning and gaining vocational skills to enable UK industry to compete in the global economy. Our approach as a funding organisation is that the way to achieve this is through innovation in digital technologies.

Our focus is on helping adults to gain the skills needed for work and supporting learners as they move through their careers, providing opportunities for lifelong learning and skills development in ways that fit around work and life commitments.

Digital technology can change the way that we access learning so that more people are able to develop their skills. The new model of digital learning will offer increased flexibility, new approaches to learning, new ways of accrediting learning, new distribution models and new relationships with learning providers.

Digital technology has the potential to work for learners who have disengaged with formal patterns of learning as well as opening up access for learners who have been unable to fit into the traditional classroom model.

It also provides the opportunity to reach industries and communities that are geographically too spread out to create a sustainable market using traditional methods. We will commit our funding over the next five years to support innovators in this fast moving world – supporting early stage ideas, showcasing how learning really impacts the workplace and demonstrating how scale can be achieved in the workplace to involve many new learners.

Our aim is to create a community of developers and learning providers that are working at the cutting edge of learning technologies to ensure that vocational learning becomes an attractive market for future investment.

In addition, we will invest in projects that have the potential to achieve scale and can show real impact in the world of vocational learning, where our funding will make a significant difference to the number of people gaining skills and the way in which they learn.

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# The current market

To achieve a real step change in vocational learning, Ufi seeks to support ideas and projects that bring a new perspective on how to design, deliver or accredit learning that builds on the current market rather than competing with it.

There is a good deal of activity in the market already and many providers are working to bring their existing paper-based or classroom-delivered content onto new learning platforms. Whilst this is a very important task, and a challenging one in the context of reducing budgets, it is not the area that Ufi believes it is best placed to support.

Up to now, cutting edge education technology developers have focussed almost exclusively on higher education or school level skills as the market for those was clearly articulated. We need to raise the profile of vocational skills and increase understanding of the importance of vocational learning to encourage innovators into this market.

The Scaling Up report in 2012 highlighted the opportunities that were emerging at that time with the pervasive ownership of computers, tablets and smartphones and the general adoption of technology to support many areas of daily life. Few could have anticipated the speed at which those opportunities would increase, with digitisation of many more services over the

last three years and the continuing increase in processing power of our everyday devices.

The FELTAG report in 2013 similarly considered the challenges and opportunities facing the Further Education sector and suggested a wide range of actions that would be needed to move providers and learners into a new digital age.

So we launch this new funding strategy at a time of great change, with increasing adoption of digital technologies and a maturing and diverse developer base. We believe that there has never been a better time than now for us to be ambitious in our plans for change in the world of adult vocational learning.

This strategy has been designed to give as much guidance as we can to potential partners and applicants for funding on how we see our vision being delivered, whilst leaving space for the inevitable change in technologies that will certainly occur over the next five years.

We will publish annual delivery plans that provide more detail on both funding opportunities and strategic developments that Ufi will support and the Board will review and refresh the overall strategy as required over the 5 year period.

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# How do we work?



Ufi is an independent charity that provides funding to businesses and organisations under the rules of the Charities Commission.



We also have an important role to catalyse change at a strategic level through communicating our work and highlighting best practice wherever we find it.



We're dedicated to the principle of being a 'lean' charity, which means keeping overheads on premises, staff and operations to a minimum where practical. So far we haven't seen the need for permanent premises and have outsourced our secretarial, marketing and investment functions.



We will continue to seek partnerships with like-minded organisations to help us to deliver our aims without increasing our cost base.



## Funding

Ufi funding will be focused into three areas, recognising that innovation in digital vocational learning will happen at different points:



**Seeding the market** by supporting emerging digital vocational learning innovation at an early stage of either the technology or the learning approach



**Market test projects** that engage learners and employers to showcase how the idea works in practice



**Large scale partnerships near to market** to demonstrate that the use of digital tech can deliver significant scale

We have three mechanisms to achieve this:



**Grant funding calls** - in specific skill areas, targeted at specific industries or aimed at specific stages of development



**Commissioned projects** - in key areas of strategic importance



**Commercial investment** - in line with our charitable aims. This can be done as loan or equity finance

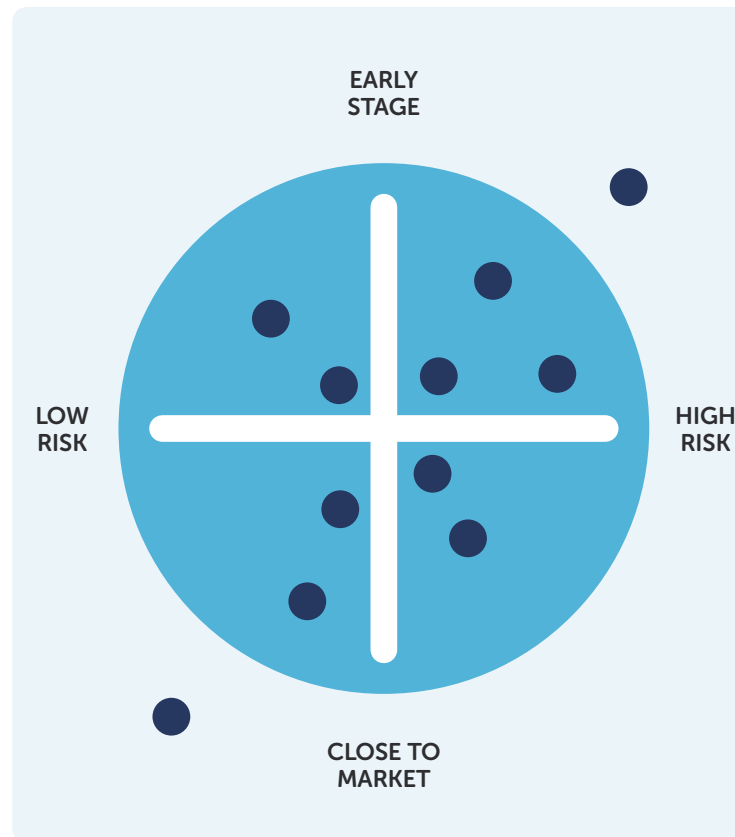
We aim to build a portfolio of projects and investments that covers a range of risk and scale and provides opportunities for ideas to receive support from early stage right through to market.

We will support both existing learning providers and those new to adult vocational learning and particularly welcome ideas that bring the two together.

In order to ensure that we have a strong pipeline of projects to fund, we will offer opportunities for innovators and developers to come together on a regular basis to share ideas and form collaborations. Many of our competitions and funding opportunities will require some element of collaboration, to ensure the exchange of ideas across developers, learning providers and employers.

Some of the projects we fund will be large scale (£1m+) and involve several partners to increase the prospect of reaching scale more quickly. As part of the commissioning or competition process for these we will run workshops to develop the ideas and build working partnerships. Details of workshops and how to participate will be in the annual action plan and on the website.

## Risk Framework



We aim to build a portfolio of projects and investments that covers a range of risk and scale and provides opportunities for ideas to receive support from early stage right through to market.

## Strategic Communication

Ufi also has an important role to influence change at a strategic level. To achieve this aim we will:

- ▶ Highlight best practice wherever we find it
- ▶ Ensure that our funded projects get wide publicity so that others can learn from and adopt good ideas as they develop
- ▶ Engage with thought leaders in digital vocational learning to keep our own ideas at the cutting edge
- ▶ Seek to influence public policy on adult vocational learning by providing examples of successful change.

If the growth of digital learning technologies is to accelerate, it is important that those working at the cutting edge are recognised and celebrated. We will set aside funding annually to create digital case studies of good practice and disseminate these widely to encourage the spread of ideas across industries and communities. This may be added to the funding awarded to projects or commissioned separately.

Our website will be developed to provide opportunities to showcase innovation, using materials that can be easily shared with others. We will also develop mechanisms for good ideas to be highlighted to us, to help us involve new partners in our collaborative developments and expand the pool of expertise in this area across the UK.

We will seek opportunities to engage at Trustee and Executive level with policy makers across the UK to share the learning that emerges from our funded projects. We welcome opportunities to take part in conferences and seminars focused on driving this agenda forward.

In all we do, we will champion the benefits of digital technologies as a means to improving adult vocational learning and bring a spotlight to areas where it is making a real difference.

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# What kinds of ideas will we support?

In this initial five year strategy, we are going to focus on a few areas to try and gain real traction in showing how our funding can catalyse change and achieve scale of impact.

Alongside this funding strategy we will continue to engage with the market and, with thought leaders in digital learning technologies, identify future opportunities to refresh the strategy.

We will publish an annual delivery plan that outlines the opportunities for funding in the next 12 months and consults on what should be in the following year's plan.

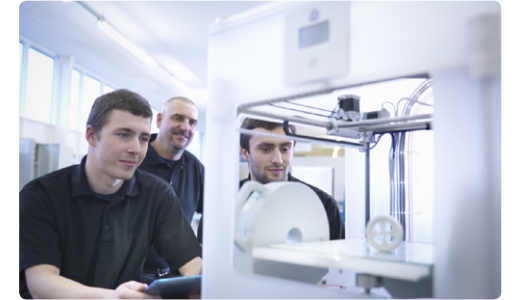
It is important to focus our funding so that we get maximum impact for the investment so we will develop a number of thematic areas on which we will focus our attention. Within those, we will fund early stage, market test and near to market demonstrator projects and investments to give us a balance of risk and impact.

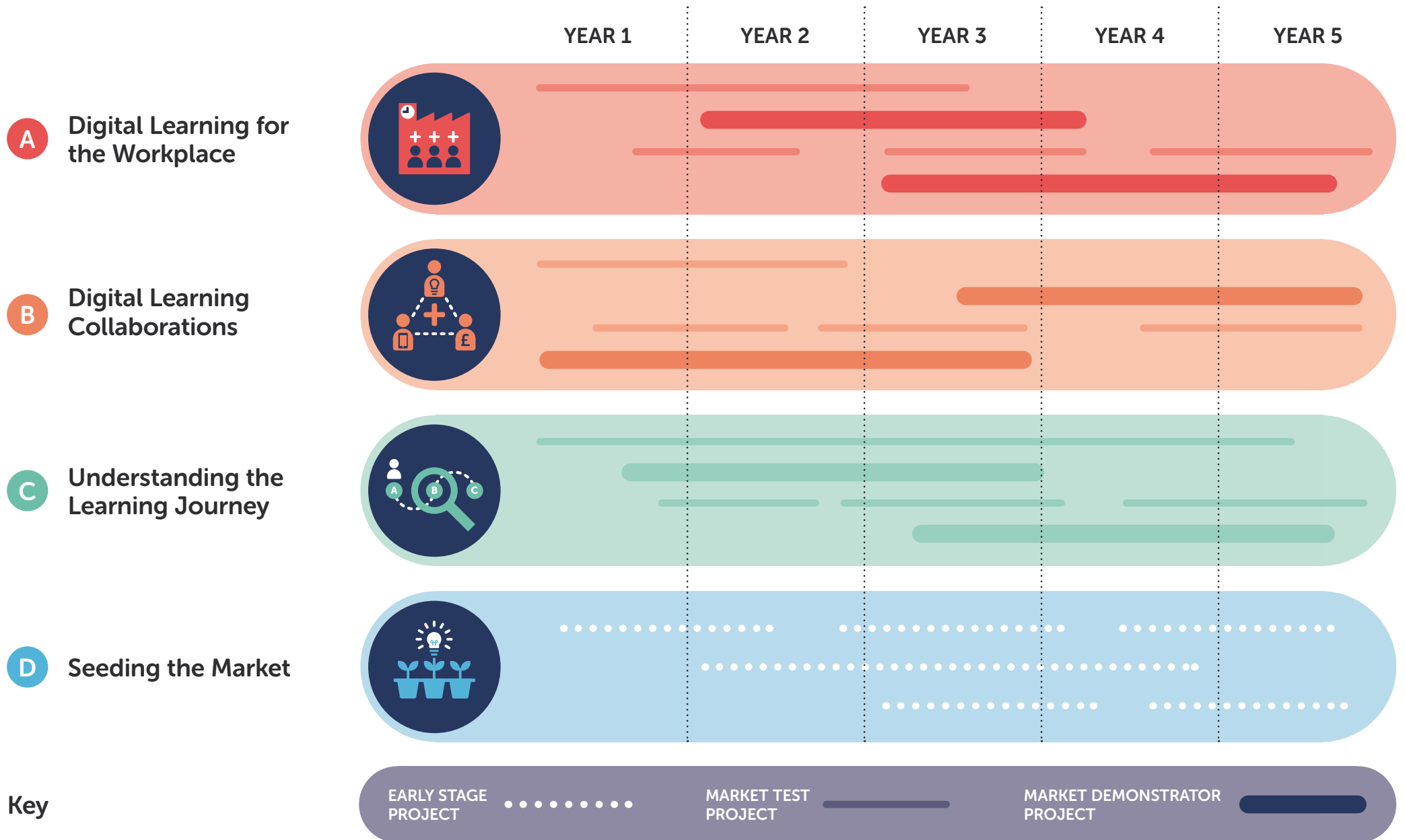
Projects proposing basic digital skills or access to work skills will not be supported unless there is a clear need for learners to start with those to enable them to move on to other vocational skills within the project. We also support learning systems and ways to access learning that could be applied to basic digital skills.

Applicants for funding should be aware that we are looking for ideas that are genuinely groundbreaking – either in their approach, their technology or the sector in which they are to be applied. We want our portfolio of projects to be something that people aspire to join as a 'badge' that they are working at the forefront of thinking in adult vocational learning.

We are also interested only in ideas that will or could ultimately be implemented at significant scale. If the market area of the test is small, projects will need to demonstrate a much wider potential end user for the idea if it is shown to be effective.

The areas we will initially invite ideas for are shown on the following pages. We will begin with three thematic areas plus an overarching investment portfolio of very early stage projects.





## A Digital Learning for the Workplace

One of the biggest challenges in vocational skills development is the gap between what employers really need and what learners perceive to be the skills demanded by the market. There are substantial productivity gains to be made by having a well trained workforce and it is important for smaller companies in particular to have access to flexible, relevant learning for their workforce and potential employees.

From a learner perspective, this is about creating bridges to employment – how do they know how and when to upskill to improve their job prospects? How do they access learning that will help their promotion prospects with their current employer or others?

In this part of the strategy we will focus on projects and ideas that help employers to communicate current and future skills requirements to the learning tech market to develop effective learning solutions. We will also explore how to engage the learners who need the skills. We will engage with all sizes of employers and business and workforce representative bodies to look for ideas that have the ability to deliver learning at scale across a number of industries.

## B Digital Learning Collaborations

In this section of the strategy we will start to explore how learning providers can collaborate more effectively to reduce costs and improve quality. Issues of competition vs collaboration have not been explored fully in learning technologies as much as they have in other areas of innovation, but the need to drive down costs in the sector is not likely to stop for the foreseeable future.

We will facilitate learning providers and developers to come together to look at the technical and business challenges of shared platforms, content creation/ dissemination and accreditation. Innovation in how to create learning content, new technologies for capturing or delivering content and how to make content widely accessible will be supported. Ufi will not fund standalone content creation projects, except where new content is needed to test an innovation as part of a wider proposal or represents a significantly new way of working in a previously undigitised industry

Given the budget constraints faced by many providers, solutions that help them to keep up-to-date with state of the art easily and continuously improve their own skills will be an important consideration.



**One of the biggest challenges in vocational skills development is the gap between what employers really need and what learners perceive to be the skills demanded by the market.**

## C Understanding the Learning Journey

One of Ufi's key objectives is to ensure that digital technologies are rolled out at a scale that will create long-term change in how providers and learners engage. Some of the early stage projects that we expect to fund will need support to reach learners at that scale.

In this part of the strategy we will support projects that focus on understanding how learners engage with digital technologies. We will showcase positive examples of how to recruit and retain learners and encourage them to see skills development as a positive lifelong process.

We are interested in ideas that deliver real and lasting change for disengaged or disenfranchised learners. This has traditionally been a market to which standard learning formats have found it hard to deliver. We are hopeful that new digital opportunities will break through some of those barriers.

Ufi does not fund pure research, so all proposals will need to be action based, engaged with real learners and creating examples that others can pick up and use. This may be using new technologies to work with learners differently, exploring new ways of accrediting or validating digital learning or removing barriers to learning for hard to reach or disengaged groups.

## D Seeding the Market

Our emphasis on working at the cutting edge will mean that some of the ideas brought to us will be at a very early stage of development either as a technology or approach. In this section of the strategy we will encourage projects that experiment with ideas in a more radical way. These projects will present a higher level of risk and are likely to be supported on a staged basis to enable progression for those that show the greatest potential for success.

There are other funders that focus on technology development, such as InnovateUK and the Research Councils, and we will seek to work with projects emerging from relevant competitions to offer them a chance to develop their ideas into the vocational learning space.

Projects applying under this strand will need to show us how the product or service will be applied in adult vocational learning, and show that they understand the particular requirements of this market. Technology based projects need in particular to be clear how the learning will be delivered in addition to the technical breakthrough.

Applicants may benefit from working in collaboration with employers or other learning providers to make sure that the idea is grounded and deliverable in this market and we will try to facilitate those collaborations.



**One of Ufi's key objectives is to ensure that digital technologies are rolled out at a scale that will encourage long-term change in behaviour in providers and learners.**



# Creating a Learning Organisation

Ufi needs to learn from all its projects and investments and build those lessons into future funding strategies.

We will take an active approach to monitoring and evaluating our work using the following principles:

- ▶ Evaluation should be built in to the start of every competition or investment opportunity and should begin on day 1. It is important to plan to gather all the information required at the outset as it is very hard to get comprehensive or reliable datasets if you ask for the data later in the process.
- ▶ Application processes can be used effectively to gather baseline information on all potential participants, giving the opportunity for some comparative studies on the effectiveness of Ufi funding. Did those projects not funded go on to success? To what extent did the Ufi funding make a real difference?
- ▶ The use of randomised control trials outside the healthcare sphere is increasing in popularity. The value of such trials is that they show if the particular intervention is more or less effective than alternatives. This can give useful insights into where future investments can be targeted by highlighting

areas where investments have the most impact. We will encourage projects to use innovative evaluation methods in evaluating their success.

- ▶ Evaluation is not a short term activity. Outcomes from projects can have 'valedictory' assessments that emphasise the successes and downplay the weaknesses. Evaluation should ideally continue to track results for a determined period after the project ends to see what long-term behavioural or cultural change has occurred. Some projects that don't seem as great at the time (e.g. work with hard to reach learners) can actually have better long-term results as those demonstrating quick wins in 'easier' target groups.
- ▶ 360 degree evaluation can be valuable in getting feedback from all potential beneficiaries – learners, providers and employers. Independent evaluation in those circumstances can lead to more objective results.
- ▶ Evaluation is useful across a portfolio of investments as well as within individual projects. Comparison across different funding mechanisms or competition types can help to refine future investments.



**Some projects that don't seem as great at the time can actually have better long-term results as those demonstrating quick wins in 'easier' target groups.**

All funded ideas and projects will be required to undertake self-evaluation and we will implement external evaluation of larger investments as part of our financial and quality control processes. Projects may be asked to create a digital diary of their work, make a short video of their outcomes at the end or come and present to the Trustees to share their learning.

Ufi will also make available the outcomes from our evaluation work through the website and through targeted communications where there are wider potential strategy and policy benefits from the findings.

Learning from all the project and portfolio analyses will inform the development of annual delivery plans and the next five year funding strategy.

## Ufi Project Quality Control Cycle





# Applying for funding

## Who can apply

Ufi funding is available to individuals, businesses and organisations in the United Kingdom. As part of the funding process we will need to undertake checks to validate your organisation’s management capability and financial ability to deliver the proposed project. We may also undertake credit checks on you or your organisation.

We are committed to helping projects to achieve their full potential, so we may offer you mentoring support alongside any funding offered if we think your organisation could benefit from external project management expertise. So if you have a great idea but aren’t sure you can deliver it alone, we may be able to help you.

## How do I apply?

All opportunities for Ufi funding will be published on our website. Closing dates for applications will be clearly shown. Some competitions will be time-limited but others may be open for proposals over an extended period. Competitions may have more than one application stage.

Each opportunity will have its own set of criteria for funding which will include:

- ▶ Type of funding (grant/investment)
- ▶ Maximum/minimum project size
- ▶ Requirements for collaboration (If any)
- ▶ Requirements for match funding (if any)
- ▶ Stage of project – early stage, market test or market demonstrator
- ▶ Competition specification – the kinds of projects that will be funded in terms of topic area.

When our funds are open all applications are made online. Applying online is simple – after registering and creating an account you can complete and submit your application at any time while the funding round is open.

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