24+ Advanced Learning Loan

Regional Communication Forums
November and December 2013
Post-Forum Report
1. Forum Overview

The Student Loans Company (SLC) held a programme of Communication Forums for College and Training Providers accessing 24+ Advanced Learning Loans. SLC welcomed selected Learning Providers to one of seventeen venues throughout England, for a 1 day forum held during November and December.

The forums were aimed at providers approved to deliver loans, with a specific focus on staff or managers with administration responsibilities, working with the SLC systems or with a learner-facing role.

The programme focused on providing delegates with comprehensive information relating to the administration systems, business processes and potential system enhancements. It also gave the chance for providers to discuss procedures, concerns and raise any questions.

Each forum accommodated all delegates in one meeting room for the duration of the day to cover the following topics;

- Year 1 statistics
- August 2013 onwards timeline
- Learning Provider responsibilities
- Business processes
- Common reasons for contact
- SLC contact channels
- Year 2 enhancements

After lunch there was an open discussion.

The forums were delivered by FE Loans Relationship Managers and the FE Loans Partner Manager, all from the Partner Management Team within the Business Development Department of SLC.

This report provides an overview of the topics that were covered as well as details of delegate attendance and feedback.

A copy of the slides was made available to Learning Providers. They were sent to all attendees after each forum.
2. Presentation Points

Year 1 statistics
Year to date statistics were shared with the forum. The statistics included application figures, payment information and the numbers of applications not progressing to payment.

August 2013 onwards timeline
Historically providers have responded well to viewing SLC activities on a timeline, due to this a new timeline was created to show SLC activity from August 2013.

To ensure providers understood their responsibilities, the timeline highlighted the quarterly attendance points as well as required ongoing activity that should be monitored.

Learning Provider Responsibilities
The forums were attended by providers of different types and size and throughout discussion it was made apparent that the way in which they administer loans differed considerably. Although their approach is varied, delegates were made aware that SLC still require certain activities to be completed to ensure accurate information is held on the Learning Provider Portal as well as allowing SLC to make accurate timely payments.

The responsibilities discussed with the delegates were;
- Learning provider portal user administration
- Checking learner information is correct at application
- Checking learner information is correct before attendance in confirmed
- Adding the Unique Learner Number
- Adding other key identification reference numbers
- Understanding NINO process
- Confirming attendance
- Performing necessary Change of Circumstances (CoCs)

Providers in attendance confirmed that all responsibilities were adhered to, albeit maybe at different stages due to how much resource they have to spend on 24+ Advanced Learning Loans.

After discussing responsibilities SLC shared compliance figures for the year so far. These included overall figures of the percentage of ULNs added, confirmed attendance and submitted CoCs. Each
The forums were organised to create an informal environment where providers could comfortably discuss their business processes with each other and SLC. It was important that the day wasn’t spent entirely presenting to delegates.

With this in mind, a slide dedicated to provider business processes was used to generate discussion and to allow delegates to discuss how they use the portal and what they would like to see improved. Topics covered were;

- Has the implementation of 24+ made you change any business processes?
- Were they planned changes or did they occur after 24+ was implemented?
- If no changes to business process as yet, do you think there will be a need in the future?
- Which department was affected the most by 24+?
- Are there any gaps in support from SLC?

Answers varied but the overriding theme was that in the first year, few providers had extra staff to manage the administration of loans and were fitting loans into whatever processes already existed. With this said, providers did advise that this was a larger, more time consuming task, than they initially anticipated and they may have to think about changing their business moving forward into the 14/15 AY.

All delegates praised the contact and support they have received from SLC which was reflected in the feedback provided.

Common reasons for contact

The forums were a good opportunity to speak to providers about the common reasons organisations contact SLC. Not only to give them a picture of what the sector is enquiring about but to also discuss root causes with an ideal view of reducing the amount of unnecessary contact. The common themes discussed were;

- Understanding the NINO process
- Processing Timescales
- Work stages
- Eligibility and Ineligible learners
- When to confirm attendance
- Why no payments have been made

All attendees were in agreement that the 6 themes were their main reasons for contacting SLC and due to the guidance received in the forum feel better informed and more equipped to deal with issues surrounding these points.

SLC contact channels

To ensure all providers are contacting the right departments in SLC, contact channels were discussed.

It was apparent that most providers had had regular contact with Student Loan Company business to business contact channels and on the whole, were happy with the support, advice and information they had received.

Fewer individuals had spoken to the learner Customer Contact Centre however concerns were raised about the consistency of advice being given. Comments were taken on board and passed to Contact Centre for review.
Year 2 enhancements

Providers were taken through the year 2 priority enhancements. SLC asked for feedback on these proposed enhancement as well as gathering further enhancement ideas for the Learning Provider Portal.

A few of the ideas shared by SLC were;

- Flag to highlight changes to an assessment
- Ability to drill down to learner name in the Loan Position Report
- Add Trainer and Course location codes to the remittance report
- Search on source of application - online or paper
- Add sub-contractor search facility to learner search
- Provide portal access for Sub-Contractors, allowing them to view their learners
- Remove cancelled and ineligible learners from basic search
- Ability to transfer learners between providers post liability – including prisoners and following mergers
- Report displaying learner withdrawal information – how many, peaks etc
- View names of learner when performing multiple CoCs
- Allow bulk upload of course trainer and location codes
- Create field which will allow provider to indicate which learners have had bursaries
- Add total number of applications on learner search page – currently only way a provider can know how many applications they have is by doing a full search

The majority of the requests were well received with only a few being deemed not essential but a welcome addition. Further enhancements were put forward by providers and these can be seen in the enhancement request section.
3. Enhancement Requests
Throughout the forum, providers put forward ideas on how to improve the Learning Provider Portal. These enhancement requests were logged.

The table below shows the enhancements which are currently under analysis:

<table>
<thead>
<tr>
<th>Enhancement Area</th>
<th>Enhancement Reference</th>
<th>Enhancement Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bulk Uploads</td>
<td>45</td>
<td>Allow bulk import of Course Trainer, Location and Additional Learner Reference Number in both XML and CSV format.</td>
</tr>
<tr>
<td></td>
<td>78</td>
<td>Allow bulk import of ULN in CSV format in addition to XML format. Allow bulk export of Learner Information Report and Loan Position Report in CSV format in addition to XML format.</td>
</tr>
<tr>
<td>Change of Circumstances</td>
<td>44</td>
<td>View names of learners when performing multiple CoC’s.</td>
</tr>
<tr>
<td>Expected payment schedule export</td>
<td>48</td>
<td>Export file of learners and their payment schedule profile to aid tracking of payments.</td>
</tr>
<tr>
<td>Remittance Report</td>
<td>23</td>
<td>Add Course Trainer and Location to the Remittance File Report and export.</td>
</tr>
<tr>
<td>Application Changes</td>
<td>36</td>
<td>Highlight changes to application to allow easy identification of learner applications which have been reassessed.</td>
</tr>
<tr>
<td>User Access Controls</td>
<td>39/40</td>
<td>Addition of new 'User Groups' to allow sub categorisation of Learner applications, for example dependant on department/Sub Contractor.</td>
</tr>
</tbody>
</table>

The table below shows the enhancements which will undergo analysis after the priority enhancements have been delivered:

<table>
<thead>
<tr>
<th>Enhancement Area</th>
<th>Enhancement Reference</th>
<th>Enhancement Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Search</td>
<td>38</td>
<td>Search on source of application - online or paper.</td>
</tr>
<tr>
<td></td>
<td>41</td>
<td>Remove cancelled and ineligible learners from basic search.</td>
</tr>
<tr>
<td></td>
<td>47</td>
<td>Add total number of applications to learner search page.</td>
</tr>
<tr>
<td></td>
<td>77</td>
<td>Display application workstage on learner information search results page.</td>
</tr>
<tr>
<td></td>
<td>84</td>
<td>In missing ULN search, do not return cancelled or ineligible applications.</td>
</tr>
<tr>
<td></td>
<td>85</td>
<td>Remove validation that forces both forename and surname to be entered.</td>
</tr>
<tr>
<td>Loan Position Report</td>
<td>37</td>
<td>Ability within the Loan Position Report to drill down to learner name.</td>
</tr>
<tr>
<td></td>
<td>82</td>
<td>Provide print facility for Loan Position Report.</td>
</tr>
<tr>
<td>Attendance</td>
<td>79</td>
<td>Provide facility to show historical attendance confirmations.</td>
</tr>
<tr>
<td></td>
<td>80</td>
<td>Add Additional Reference Number/ Learning Aim Reference to attendance worklist.</td>
</tr>
<tr>
<td>Change of Circumstances</td>
<td>42</td>
<td>Ability to transfer learners post liability where the learner is a prisoner or where the learner’s LP has merged with another LP.</td>
</tr>
<tr>
<td></td>
<td>52</td>
<td>Allow Providers to raise learning aim change CoC for ineligible learners if the ineligible reason is ‘ineligible learning aim’.</td>
</tr>
<tr>
<td></td>
<td>81</td>
<td>Allow pre approval learner application cancel CoC.</td>
</tr>
<tr>
<td>Ineligible Information</td>
<td>51</td>
<td>Provide greater information on ineligible reason (within boundaries of data protection).</td>
</tr>
<tr>
<td>Bursaries</td>
<td>46</td>
<td>Create field which will allow users to indicate which learners have had bursaries.</td>
</tr>
</tbody>
</table>
4. Recommendations to Programme

This programme of forums promoted a chance to build relationships with SLC and discuss all areas of 24+ Advanced Learning Loans, due to this open format providers naturally had feedback for all areas of the business. Any recommendations made for improvements to these other areas have been collated and passed on to the relevant programme leads.

Access to HE Learning Aims
A number of providers ask for these aims to be made available sooner in the academic year. Following discussions with the Skills Funding Agency, it has been agreed that these 14/15 learning aims will be available from May 14.

More consistent advice from Customer Contact Centre
It was noted that the feedback from providers regarding the SLC Customer Contact Centre was varied. Feedback surrounding this will be taken to the monthly Operational KIT meeting where it will be discussed.

Other Recommendations include:
- Ensuring training is not solely product based, but advisors get the chance to understand the end to end process including the entire application process as well as provider responsibilities
- Pointing out the differences between HE and FE, as a lot of the advisors have been up skilled, and have historically given HE answers to FE questions.

5. Extra guidance
Providers commented that the fact sheets and user guides provided by the Partner Management Team were helpful, useful and easy to follow. Providers advised that more of these would be useful. In response to this, a collection of Information Factsheets and administrative process Quick Guides have now created and added to Support Material section of the Learning Provider Services website.

Guidance will come in the form of additional fact sheets as well as bite sized guides on particular administration processes.
Appendix 1  Attendance

The communication forums were designed to accommodate a small number of providers which would allow a more informal atmosphere. This format would enable SLC to present and discuss material with attendees, receiving instant feedback.

A cross section of Colleges, Private Training Organisations, Partnerships/Consortiums and Employers were invited. Any provider not invited received a communication from their Relationship Manager to outline alternative communication routes.

Due to the size of the events, Learning Provider facilities were used as meeting venues which meant that more forums could be held making it easier for providers to attend.

17 forums were held throughout England. These were held in the following locations;

North of England
- Newcastle
- Leeds
- Sheffield
- Preston
- St Helens
- Manchester

The Midlands and East Anglia
- Nottingham
- Leicester
- Milton Keynes
- Cambridge
- Coventry
- Shrewsbury

The South of England
- London
- Exeter
- Croydon
- Southampton
- Kent

259 delegates attended the seminars. These attendees represented 221 organisations.

The attendance was evenly split between the 17 forums with numbers ranging from 15 to 25.

Attendance was also relatively evenly split by region. Of the Providers that attended 30% were from the North of England, 43% were from the Midlands and East Anglia and 27% of Providers in attendance were from the South of England.

Regional Attendance Breakdown;
The charts below show the split of attendance from providers in each region. For the purposes of this chart each provider is only counted once, even if they had more than one delegate in attendance.
Chart 1
Chart 1 shows the regional split of how the attendees of all forums were made up i.e. of the 221 organisations in attendance 30% of those organisations were from the Midlands.

Chart 2
Chart 2 shows the percentage of organisations that attended for the region compared to how many were invited i.e. of the 135 invited organisations from the North, 95 (70.4%) were able to attend.

<table>
<thead>
<tr>
<th></th>
<th>North</th>
<th>Midlands</th>
<th>South</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attended</td>
<td>95</td>
<td>66</td>
<td>60</td>
</tr>
<tr>
<td>Invited</td>
<td>135</td>
<td>127</td>
<td>138</td>
</tr>
</tbody>
</table>
Provider Type Attendance Breakdown;
The chart below shows the split of attendance by provider type. For the purposes of this chart each provider is only counted once, even if they had more than one delegate in attendance.

Chart 3
Chart 3 shows the split of attendance by provider type. They organisations have been split into 3 different categories:
- Colleges
- Private Providers
- Partnerships/Consortiums
- Local Authorities

It is clear to see that Colleges were the most represented group at the forums; this was expected as Colleges make up a high percentage of all of the Learning Providers currently engaged in 24+ Advanced Learning Loans.

Overall the breakdown of attendance by type closely reflects the percentage of Learning Providers currently engaged in 24+ Advanced Learning Loans.
Appendix 2  Feedback

To ensure that SLC could capture feedback effectively, delegates were given the opportunity to complete optional feedback forms.

Feedback forms were completed at the end of the forum and questions related to the entire day.

**Feedback Scores**

There were 11 questions on the feedback form. Of the 11 questions, 10 asked the attendee to mark on a scale from 1 to 5 (with one being the lowest and 5 being the highest). Questions asked are detailed below;

<table>
<thead>
<tr>
<th>No.</th>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Did you feel that the forum material was current and relevant to your organisation?</td>
</tr>
<tr>
<td>2</td>
<td>Issues for your organisation</td>
</tr>
<tr>
<td>3</td>
<td>Did the forum content address issues for your organisation?</td>
</tr>
<tr>
<td>4</td>
<td>Were the questions raised within the forum handled satisfactorily by the Relationship Managers?</td>
</tr>
<tr>
<td>5</td>
<td>Do you feel that you were provided with suitable tools to cascade the information you received at the forum within your organisation?</td>
</tr>
<tr>
<td>6</td>
<td>Do you feel able to carry forward the service actions given to you at the forum within your organisation?</td>
</tr>
<tr>
<td>7</td>
<td>How would you rate the format of these events?</td>
</tr>
<tr>
<td>8</td>
<td>Do you feel that your Relationship Manager is an effective source of advice and guidance?</td>
</tr>
<tr>
<td>9</td>
<td>Do you feel that your Relationship Manager is an effective route for escalated operational issues?</td>
</tr>
<tr>
<td>10</td>
<td>Do you feel your Relationship Manager is effective in delivering messages about changes that will affect your organisation?</td>
</tr>
<tr>
<td>11</td>
<td>How would you rate, on the scale below the benefit of the relationship management offered by SLC’s LP Services Partner Management Team?</td>
</tr>
</tbody>
</table>

The responses collected for all forums have been collated and an average score for each question has been produced.

**Average Score per Question**

![Average Score per Question](image)

<table>
<thead>
<tr>
<th>Question No.</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10</th>
<th>11</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forum Average</td>
<td>4.7</td>
<td>NA</td>
<td>4.3</td>
<td>4.8</td>
<td>4.5</td>
<td>4.5</td>
<td>4.7</td>
<td>4.8</td>
<td>4.8</td>
<td>4.8</td>
<td>4.8</td>
</tr>
</tbody>
</table>

Of the ten questions that were scored between 1 and 5, none scored lower than a 4. At a glance this shows that the forums were a successful programme of events for Learning Providers.
Highest Score
The highest score received was for questions 4, 8, 9, 10 and 11. They all receive a score of 4.8. All of these questions revolved around the Relationship Management Team and asked how effective they are at answering questions, escalating issues, communication and the overall benefit of the team. The high score, along with accompanying comments prove that providers find the team a useful contact point when dealing with loans and have a high level of trust in the team.

Lowest Score
The lowest score received was for question 3, it obtained a score of 4.3. Question 3 asked “did the forum content address these issues for your organisation”. The score of 4.3 is classed as ‘very good’ but after reading the comments from providers it is apparent that the average was brought down as some providers did not have any applications to date and therefore felt less involved with all of the discussion points. This information will help SLC adapt the 2014 forums to either add discussion points or review how the attendees are chosen. As in 2013 organisations were invited using historical loan allocation data where we would like to move towards using data revolving around application numbers and Learning Provider Portal use.

Feedback Comments
As well as asking delegates to answer predetermined questions there was the opportunity to leave comments relating to the forum, the Partner Management Team and the overall 24+ Advanced Learning Loan process.

These comments will be fed into the model of future events to ensure they remain relevant and informative. A few of the comments are detailed below;

Positive Comments
- Helpful to have a forum format to give us a chance to discuss queries and problems and share good practice
- Format is really good and allows discussion and the ability to address relevant points
- Please can we have more of these as they are very useful
- Very good opportunity to meet with other organisations and get feedback and share best practice
- Very friendly and knowledgeable team. They listened to our needs and will take actions forward so it seems like a more personal service and tailored to LPs
- Very good to be able to put forward suggestions for improvements to the LPP and also to receive clarification on various areas
- Think the format today is effective, feeling informal and allowing everyone the opportunity to speak and ask questions
- Relationship Managers are an excellent source of help, invaluable team

Formative Comments
- Excellent source of information but Relationship Managers are not always easy to get hold of for learner queries but this is never an issue as others can assist
- Need more people in attendance from own college - restricted to 1 place per person
- Would have liked handouts at the event rather than slides emailing after event
- More subcontractor information. You mentioned a separate subcontractor forum, this would be helpful
- Due to lack of applications some of the questions have not been applicable to our organisation to date