

Balancing financial sustainability with the institutions' social mission

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A few words
about me and
what I am
doing here...




Everything
is in an
equilibrium...



... but does
that also apply
to our funding
versus our
social mission?





Balancing financial sustainability
with the social mission of (U)LLL
providers and organisations
Is there an inherent contradiction?

Financing



Is our demand that everything stays the same?

Sustainability



Financial sustainability



Social mission





Let's measure the
temperature!



In the
beginning
was...



... an EC Thematic Working Group on
Financing Adult Learning

Key messages from the EC Thematic Working Group

1. Investment in adult learning supports creating a more equitable, cohesive, sustainable and competitive Europe through development of better skills and competences.
2. The rates of return to smart and efficiently organised adult learning can be as high as those for investment in initial education; and should be recognised as part of a well-balanced overall investment in lifelong learning.
5. European funding (in particular European Social Funds and Lifelong Learning Programme/Erasmus +) should be linked directly with mainstream national adult learning funding to assure sustainability.
11. Selective use of a range of funding instruments enables better targeting of resources for particular groups of adult learners; ensuring maximum value for money.

And the rest is
history! ... ?

FinALE tries to answer the following questions:

- Why is (public) investment in adult education necessary?
- How should the financing be measured so that the measurement is comparable across countries?
- Which fields of adult education should be supported?
- How does funding of adult education impact the lifelong learning of individuals?
- What is European best practice of funding adult education?

Can we measure financial sustainability?

System Performance	Indicator	Potential data source
Investment in adult education	% of GDP invested in AE	Governmental estimates
Efficiency	Cost per learning hour	Provider estimates
Effectiveness	Return on Investment	Stakeholder estimates
Sustainability	% of course costs funded by non-public sources/individuals	Provider estimates

Which funding tools do we have?

- **1. Programme funding**
- **2. Learner fees**
- **3. Project funding**
- 4. Direct grants
- 5. Formula funding
- 6. Vouchers / Individual Learning Accounts
- 7. Philanthropic funding
- 8. Payback clauses
- 9. Tax incentives
- 10. Loans
- 11. Training leave

... but for only 39 percent of respondents, their funding model ensures sustainability and guarantees their future as providers of adult education

How do these funding tools ensure financial sustainability and support the social mission?

- **Continuous funding vs. one-time funding**
- **Direct vs. indirect funding**

FinALE products

ADVOCACY



- A research paper on “Why invest in adult education?”
- A research paper on indicators to measure financing
- A research paper on funding tools
- A stakeholder mapping of the funding of adult education
- A survey and research paper on “Where to invest”
- A collection of learners’ stories
- A list of policy recommendations
- An executive summary

... soon on <http://www.financing-adult-learning.eu/>



Split up in groups à 3 to 5 persons and discuss the advantages and disadvantages of these funding tools – keeping the social mission of ULLL institutions in mind:

- Public/direct funding
- Project funding (e.g. Erasmus+, Horizon2020, ESF,...)
- Student fees
- Public-Private Partnerships
- Philanthropic funding (e.g. charity funding, donations,...)

Can you draw any conclusions or make recommendations for ULLL providers and/or policy-makers?

THANK YOU!

For further questions, please don't hesitate to contact
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