

Case studies of effective models of financial learning for the Scottish Government

What were we asked to do?

In 2007 the Scottish Government's Lifelong Learning Directorate commissioned Blake Stevenson to conduct case studies of 14 projects across Scotland delivering effective financial learning to different groups in the community such as ethnic minorities, the elderly, long-term unemployed and offenders.

Following publishing of the case studies, we ran a workshop at the Scottish Adult Numeracy Seminar and we are organising and facilitating two conferences to highlight and discuss the learning from and impact of the case studies with policy-makers and practitioners.

How did we approach the research?

Our work involved the following methods:

- In-depth project visits to conduct interviews with project managers and staff and focus groups with service users
- Detailed case studies described each project's approach, outcomes and lessons learned
- Sharing case studies online and through seminars and workshops

What did we find?

We found that successful financial learning projects across Scotland were engaging with the local people in a variety of contexts through:

- a partnership approach;
- a dynamic and practical approach to engaging learners;
- use of appropriate learning activities;
- use of interesting and interactive materials; and
- on-going progression and support.

The effect of these lessons was that they were giving beneficiaries the knowledge and understanding of financial issues and the confidence to take control of their finances and manage their own money.