Developing the University for Industry Concept: An Evaluation of ADAPT Round 3 Projects - Case Studies

Jim Hillage, John Atkinson, John Barry, Sara Dewson, Mark Stevens, Ken Walsh, Polly Kettley

Institute for Employment Studies

department for
education and skills
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The Case Studies

Black Country Ufi Pilot Network

The project

The original aim of the project, known as the *Black Country Ufi Pilot Network*, was to develop, pilot, promote and evaluate various options for training programmes and delivery through a network approach in the Black Country. It set out to provide a framework for the development of the Ufi concept locally and concentrated on the following two key sectors identified under Ufi:

- automotive components
- distributive, wholesale and retail services.

Both sectors are important parts of the Black Country economy, an area which basically encompasses the four Metropolitan Boroughs of: Sandwell, Dudley, Wolverhampton and Walsall. They are also potentially vulnerable sectors, particularly automotive components, the fortunes of which are largely dependent on the success of the large UK motor manufacturing plants located in the Midlands.

The focus of the project in the automotive components sector is on the logistics of supply (JIT, *etc.*) and rapid prototyping (basically a method of generating CAD models into actual 3D models automatically and quickly), all linked to the pressures placed upon component manufacturers to meet quality standards and problem solving issues dictated by customer firms (usually through ISO/QS9000).

Some of the same quality issues apply to the focus in the distributive, wholesale and retail sector, though here there is a direct emphasis on the logistics of operation (stock control, *etc.*).

In addition to this sectoral focus, the project also examined one thematic subject and this is the development of general management skills for SMEs.

Origins of the project

The foundations of the project can be traced back to 1997 and the formation of a sub-regional consortium on education and training which metamorphosed into *the Black Country Partnership for*

Learning. The initial meeting was convened by the University of Wolverhampton (who are the lead organisation in this ADAPT Round 3 project) and involved the local TECs, MBCs, FE colleges, Careers and other interested groups.

The initiative helped overcome some of the local competition between the FE colleges (there are at least seven in this relatively small geographical area, plus lots of others in the greater West Midlands conurbation), although there was precedent for them working together. Firstly, there was plenty of bilateral and personal staff links in evidence. Secondly, there had been co-ordination of New Deal provision between the Black Country colleges.

The ADAPT Round 3 programme was recommended to the partnership as a useful vehicle to underpin some of its development work, with the rationale being that it would help provide a platform for the delivery of Ufi locally. Four of the partner organisations (Sandwell TEC, Bilston College, Black Country consortium of MBCs and the University of Wolverhampton) took the lead in developing the proposal and various options were presented to the partnership for their consideration. The proposal was able to draw on existing research in certain aspects of the work, but considerably developing these into the fully worked-up proposal.

Progress to date

Following a review of the project orientation towards the end of 1999, a decision was made to concentrate on four college-based projects and not to pursue the wider objective of developing a framework for Ufi in the sub-region. It was felt that the development of Ufi and **learndirect** nationally was beginning to have an effect earlier than envisaged when the project was first designed and so trying to pre-empt activities in the Black Country was not felt to be appropriate.

These changes resulted in a scaling back of the resources for the project, mainly affecting the recruitment of two specialist staff, one to cover marketing and the other informatics, though in the latter case it was possible to offer some support to projects through the part-time appointment of a member of staff from the University of Wolverhampton.

The project was to receive a further disturbance early in 2000 when the project manager was withdrawn from the post following a decision by Dudley College (where the project office was based) to cease its support (though retaining its interest in the individual college-based project it was working on). At the same time, the part-time consultant from the University of Wolverhampton who had been supporting the manager, also left (taking up an early retirement option).

The vacuum created was at first difficult to fill, with none of the college partners volunteering to take on the management role. In the end the university, as contract holder, stepped in and appointed a manager experienced in ESF project management on a notional half time basis. Since then, the project has gone relatively smoothly and is set to achieve the realigned goals by the end of March 2001, following a three-month extension to the original project deadline of the end of December 2000.

The project has concentrated on four college-based projects described as follows:

- *Halesowen College*: Development of Statistical Process Control (SPC) for SMEs aiming for QS9000 in the automotive and steel sectors. CD-ROM based learning material is available now and is being used

- *Stourbridge College*: The college's industrial training arm (Kingswinford Industrial Training Services) had responsibility for developing two courses in CR-ROM format, one in LGV (light goods vehicle) test theory and the other in pre-vocational LGV training. Both courses have been tested on trainees from SMEs

- *Walsall College*: Within the European Design Centre at the college, a course has been developed on CD-ROM for rapid prototyping aimed at SMEs who need access to low cost CAD modelling facilities. The product is being tested and is expected to be available for Internet based delivery once trials have been completed

- *Dudley College*: Working in collaboration with the EEF West Midlands, the college has developed a CD-ROM package on learning in supervisory skills aimed at SMEs. This is already available over the Internet and is the most developed of the four projects.

In addition, resources from the project have been used to fund a survey of Black Country employers. This was run by Walsall TEC and aimed to assess the learning needs of SMEs across all sectors of the local economy. The survey is now complete, though the results appeared later than envisaged and so have had less influence on the design of individual projects than was first thought. Nevertheless, the findings appear to confirm the relevance of the learning materials developed and their sectoral and occupational focus.

The planned website for the project has not been developed as a dedicated one for the project, as was originally planned. However, information from the individual projects are now available on the website of the Black Country Partnership for Learning (though details are limited) and individual colleges also have some information on their own websites.

In addition, a project newsletter has been produced (there will have been four by the end of the project) which has been sent to a wide readership and this complements other dissemination activities that have taken place. A project wide dissemination event was held at the local science park where all the main partners presented their projects. However, attendance by SMEs was disappointing, though it is likely that more are being reached through the wider dissemination activities of the individual partners.

Transnational links have taken place at an individual project level, with three out of the four reporting contacts of various sorts. Dudley College, for example, was able to use the extensive EU contacts of the EEF to hold some useful exchanges with German partners. However, some of the other links have been less effective largely because the EU partners lacked specific funding for engaging in links with the UK partners.

Ufi influence and involvement

The project stemmed from a strong recognition in the partnership of the broad objectives of the Ufi concept. In some senses they wanted to be pro-active in establishing good background information that would set the foundations for the development of the Ufi concept locally and so avoid any possibility of being directed down a route that was not deemed suitable for the area.

As the plans of the Ufi have emerged, there have been various applications from the partnership and individual colleges. The application on behalf of the partnership for hub status was not successful and this was a disappointment. In some ways the project has been adversely affected by the pace and nature of the developments in the Ufi. Some activities (*eg* marketing) have been scaled down to avoid any conflict with the push on **learndirect**. The emphasis since the beginning of 2000 has been on individual projects projecting their own outcomes and potential.

There have been no substantive links between the overall project and Ufi/**learndirect** and cluster group working has not really developed here. However, individual colleges have had some contact with **learndirect** and have taken various initiatives forward such as the **learndirect** Centre located in the new E-Commerce Centre at Halesowen College.

Partners

The original collaborators in this project are basically all those organisations represented on the Life-long Learning Partnership. There were 21 in all and they covered the following groups of organisation (with the number of representatives in parentheses):

- University of Wolverhampton (2)
- Further Education Colleges (8)
- Training & Enterprise Councils (4)
- Schools with Sixth Forms (1)
- Metropolitan Boroughs (4)
- Careers Services (1)
- Engineering Employers' Federation West Midlands (1).

All can claim to have some working relationship with some of the partner organisations and representation is at varying levels. The EEF is the only representative of industry.

The different groups of organisations brought particular strengths to the project. For example, the TECs were seen as doing much of the initial research for the project, with their interest fitting closely with their objective to facilitate an upskilling of the Black Country workforce. The FE colleges naturally had a direct interest in the outcomes of this project and of the Ufi concept generally, but also have pre-existing experience to bring. For example, one of the colleges already has a 'Micro Centre' for IT training in SMEs.

Near to the conclusion of the project, most of the partners were still on-board, particularly the core partners. However, there have been some changes in the FE sector with, for example, Rowley Regis College pulling out because of its other concerns (inspection and possible merger in particular). Also, the imminent demise of the four TECs in the Black Country (and the emerging LLSC) has seen Dudley TEC effectively withdraw from the project and Sandwell TEC has not been particularly active.

The University of Wolverhampton has continued as the contract holder, but since early 2000 has also been in direct charge of the project following the decision by Dudley College to withdraw its support for the management of the overall project. The extensive experience of the university in running European funded projects has undoubtedly meant that the project has managed to steer a useful course towards its conclusion in often difficult circumstances.

Project management

The original project based at Dudley College offered good facilities, based in a dedicated ESF operation. The project manager was assigned to the project on a part-time basis and was assisted by a consultant from the University of Wolverhampton, who also played a large role in the drafting of the original ADAPT Round 3 proposal, thus providing continuity. Both these individuals brought a great deal of experience to the project, in the subject matter and in ESF projects, and together formed an effective

management team in the early stages of the project. At the same time, the university of Wolverhampton held the contract and provided financial and administrative support.

The main change at the end of 1999 was to scrap plans to recruit two full-time posts in marketing and informatics, largely due to the difficulties in getting college partners to agree to take on the employment commitment under their matched funding arrangements. As a result, the project budget was scaled down by around 14 per cent overall.

This was followed by changes in the management of the project early in 2000 (as outlined above) when the Dudley College based team was replaced by direct management from the university.

The project Steering Group met regularly with representation from all the groups in the Black Country Partnership for Learning, though to make it an effective body, there were just two representatives from the different groups (*eg*, two TEC representatives, two from the FE colleges, *etc.*), plus the project manager. Initially meetings were held every five or six week, with some tasks allocated to smaller working groups (notably a research sub-group). However, towards the end of the project these meetings had become less frequent.

Initially there was undoubtedly a strong commitment to the project from the partner organisations, indicated by the senior staff attending the steering group meetings. However, to some extent this support did not always translate into appropriate resources at the organisational level, a situation which was not helped by the difficulties with funding. Here there were problems early on with the flow of funds, attributed in part to the real problems in getting matched funding verification (a particular problem with SMEs). These problems had been persistent and even towards the end of the project some partners had not received any funding.

Overview

As the project moved into the implementation phase, there were some difficulties in keeping to the original objectives, partly as a result of the internal problems over funding and project management and partly due to the external effects of Ufi/**learndirect** development plans. Some of the problems inevitable arose because of the real difficulties in keeping a large and inclusive set of partners committed to the project, especially in the dynamic situation prevailing for colleges and TECs, for example.

Nevertheless, judged on the outcomes of the four individual college based projects, the overall project has produced some useful results. The learning materials now available have been (in

most cases) tried and tested and have shown potential in the narrower sense of the courses for which they will form a part and, in the wider sense, providing a blueprint for the development of other multimedia based learning.

Development of Common Standards for Learning Objects (DECOSLO)

Overview of the project

The main aim of the DeCoslo project was to develop the ICT knowledge, understanding and skills to enable UK education and training to adapt to a new e-learning environment. Specifically DeCoslo partners collaborated to address four main aims:

- to develop new solutions to current barriers to learning using ICT

- to develop common ICT standards to learning using ICT

- to develop the ICT infrastructure to assist partners

- to equip learning centres with the tools to create multi-media learning content around qualifications, from any source.

The partners have, over a two year period, successfully implemented international standards for classifying and presenting information, content and knowledge, mapping against units for a BTEC Higher National Certificate in Computing qualification. A total of 10 trainers from the public and private sector were trained by partners at North Lincolnshire College in how to use the ICT system and design online training courses. Subsequently 100 beneficiaries from SMEs in London and Lincolnshire acquired new ICT skills of value to them at work.

During the life of the project the interest in the DeCoslo approach intensified as more people and organisations became aware of the implications of the convergence of digital technologies and the importance of international standards for learning object technologies. Until the partners came together to collaborate in the ADAPT programme few people outside of academia had heard of meta data standards. The partners are now recognised as being at the leading edge of online content development, assembly and delivery in the UK. DeCoslo's greatest achievement is to have demonstrated via successful applications in 'real' settings the strategic benefits of developing metadata extensions for 'UK education plc'.

Project management

The methodology employed for the project management of DeCoslo proved particularly effective, The report from Arthur Anderson and the visit from the ADAPT Support Unit complemented the strong project management. Milestones were identified and Prince methodology was used to inform Management Group decisions. The Technical Project Manager used Microsoft Project throughout the programme to communicate with parties.

A national Steering Group met on eight occasions. Their role was to receive reports on operational and transnational progress and to offer guidance and advice. Early on in the project the Steering Group recommended that more resources should be allocated to evaluating the project management processes and procedures. This action proved helpful and kept the project on track as did the project visit from the ADAPT Support Unit team. The quality of the membership of the Steering Group including Ufi and QCA members proved invaluable for mainstreaming purposes and helped to ensure DeCoslo's influence on national developments.

The Project Management Group, composed of representatives from all partners, met frequently. The group were able to allocate resource where and when necessary during the life of the project. The project manager maintains that their ability to 'think out of the box' and the flexibility to grow creatively within a framework were strong characteristics of the pilot project. The ability to move beyond the original intention to harness the outcomes to full qualifications is one of the success factors in the project. Experience gained during the project demonstrated that most beneficiaries wanted skills more than qualifications and that the focus for customised e-learning should be much more granular than originally conceived.

Dissemination

From January 1999 through to the end of the project the partners put a lot of resource into promoting and disseminating the project. The Extranet site developed by the project demonstrated that a mainstream portal for the online learning community can not only be an effective dissemination vehicle but a store for training articles and presentations on learning object technology development.

DeCoslo were invited to present to several Government Ministers including Michael Wills, Malcolm Wicks and Paul Boateng. Follow-up meetings with senior DfES officials are ongoing.

Problem areas

DeCoslo was able to demonstrate that customised e-learning is now a very achievable possibility in the UK, but it took much longer to find the solutions than had originally been anticipated.

In the early stages of the project start-up phase a lot of energy was spent trying to agree a common vocabulary and clear understanding of roles. This process was much less time consuming when it came to working with trans-national partners as thinking and understanding had become clearer. The technical project manager recorded all decisions and his management and version control was a key factor in the projects success.

In dealing with content objects and building an integrated ITC system the issue of IPR caused some anxieties amongst partners at some times. All partners took legal advice and following guidance from the ADAPT support unit all partners were satisfied. If the project had had access to advice at the start assurance could have been reached earlier.

A major difficulty arose following the visit of the ADAPT support unit in 2000 when the partners were told that the intention of one partner to make some of their contribution in kind in the form of software would be too difficult to cost. One result of this was despite giving the project cash the private contribution from this partner was considerably less than anticipated. This was more than mitigated in the end by an additional contribution in kind from another private partner. This was unintentional and the result of the nature of the IT design, build and test of the ICT system taking approximately 35 per cent more staff time than planned.

Recruiting beneficiaries proved a more difficult task than originally perceived. The project felt that the database of contacts provided by the TECs in London and Lincolnshire would have been sufficient to attract the target numbers of eligible beneficiaries but in London this was not the case. Marketing in the rural area of Lincolnshire was relatively straightforward. A combination of mail-shots targeted from the TEC database, adverts placed in job centres and the local FE College newsletter plus posting of flyers proved successful. This could have been because the FE college is the main provider of ICT training in the region and therefore beneficiaries were used to focusing their attention their to meet their training needs.

Marketing in London proved more of a challenge. Firstly only CAD training was offered here which is more of a specialist skill area for the Creative Industries target group. The initial mail-shot to SME contacts drew little response nor did the web-site attract eligible beneficiaries. Following the successful practice gathered from another ADAPT project, AGORA, local business 'champions'

were targeted. These people used their networks to display posters in key places for their sector. Again this proved disappointing, the feedback received was that some people felt that they had been swamped with offers of free training by ESF projects. Edexcel used its network of training providers and employer organisations to try and reach the target group, again with little response. Adverts were placed in large circulation magazines in London that produced some results but were not very encouraging

Finally, it was decided to employ outside expertise to recruit beneficiaries. TCAT Limited were engaged and they targeted Building Design Magazine as a popular publication for interior designers and architects in the creative industries sector. Adverts placed in this target publication drew an excellent response and the recruitment of the target number of eligible beneficiaries was achieved by November 2000.

The training of London beneficiaries was not completed until the end of the project and the beneficiaries recruited did not take up the assistance budgeted for. There was therefore an under-spend in this category.

The project received a big set-back for its dissemination plans when the World Internet Forum conference where DeCoslo was going to exhibit and run conference workshop sessions was cancelled. Over three months work had gone into preparing for this event with an impressive list of international and UK decision makers due to hear about the project. Much of the material produced for this event was distributed elsewhere.

Project evaluation

An interim report produced in December 1999 noted the successful development phase of the project and high level of dissemination that had taken place. The second phase of the evaluation was completed in January 2001 and focuses on the impact of the project on the beneficiaries. The beneficiaries include employees from SMEs who attended the pilot courses and the college tutors who were trained to compile and deliver them.

All the targets were met however the milestones originally identified at the outset were seldom achieved as planned. Many had to be internally reset by the Management group, for example the published dates to begin training of beneficiaries.

The ultimate impact and benefits from the investment in DeCoslo will depend on the ability of ability of the DfES to effectively manage mainstreaming post ADAPT.

Beneficiaries

The evaluator, Synergis, interviewed 25 individual employees. Twenty-one had attended AutoCAD training in London and the remaining four had attended Dreamweaver web page design training in North Lincolnshire. The AutoCAD training in London had been tailored to the design and architectural sector whilst the training in North Lincolnshire had been developed for engineers. Primary data on the qualifications and learning expectations of the sample group was collated.

The ADAPT support unit advice was followed on the format for training. A four hour initial evening training session was held followed by another four hour session a week later. Intensive classroom tuition was provided. Beneficiaries were given a customised training manual prepared for DeCoslo and a password that gave them access to the customised online support materials on the secure Extranet site. Beneficiaries used the manual and online course to learn at their own pace between sessions. Beneficiaries were given a 45 day CAD software license to practice their CAD skills with. Following completion of the classroom sessions each beneficiary was given a full Autodesk training manual and a full Autodesk software package to enable them to apply their skills in the workplace.

The impact on beneficiaries from SMEs centres on an improvement in their CAD or web page design skills. The evaluation conducted by Synergis illustrates that a number of participants were already utilising what they had learned in the workplace. Beneficiaries reported a range of spin-offs from the training including career development, better IT skills and an understanding of how IT impacts upon the workplace. All the beneficiaries interviewed intended to develop their IT skills further and a small number were aiming to attend more training and achieve a relevant qualification. The majority of those interviewed were satisfied that their expectations had been met either partially or fully.

Tutors and course leaders spoke of having experienced a 'steep learning curve' and of learning a considerable amount about managing learning environments and determining appropriate learning objects.

Learning via ICT

Until recently on line learning materials have been:

- expensive to produce
- inflexible to personal learning style
- restricted to a single application area

- inaccessible for navigation

- locked into a single platform.

The way forward for employers wanting to become learning organisations or individuals wanting to benefit from anytime, anyplace learning is dependent on content developers adopting the principles of interoperability and reusability promoted by DeCoslo.

To expand, an average multimedia course costs approximately £300.000 to produce. Such speculative investment is risky and those developing material in technological curriculum areas also face the additional risks of small bespoke markets and early obsolescence. There is a general realisation that on-line courses will in the future be assembled from relatively small learning objects rather than produced as one large product. These learning objects, be they theory, assessment, multi-media, simulations or whatever, can increasingly be accessed and downloaded from the web. In order to make that access a reality, each learning object will have to be identified by a series of metadata tags. As well as indicating ownership (for possible payment) the tags will have to express such items as the subject, level, type of object and type of media. In order to realise their potential there obviously needs to be common international standards for metadata.

DeCoslo has developed a system that:

- enables a learner to select an assembly of educational components that suits their individual learning style and needs

- enables a trainer to create a variety of assemblies of educational components to suit different learners' requirements.

DeCoslo was able to demonstrate that effective e-learning in the project was a combination of online learning, classroom training and paper based support. The key innovation was to give the learner choice. Success e-learning puts the e-learner at the heart of the learning process. Customising and personalising online courseware is key.

The implications for the FE/HE education sector are significant. Attempts to modularise the curriculum are not new. DeCoslo has demonstrated that one obscure learning object previously hidden within a course can now be made available to a worldwide audience for subsequent assembly into any appropriate educational programme. The ability to find generic learning material that has currency over several programmes will engender modularisation and, even if used within traditional course structures, will enable a wider range of curriculum opportunities.

Transnationality

The partnership combined a full range of transnational activities to assist in achieving its objectives including: exchanges of information and material, joint seminars and conferences, exchange of staff and study visits. The goal of the transnational element was to:

- raise awareness amongst training providers and companies of the potential use and implementation of learning technology standards
- establish a transnational network of users to customise and assemble content objects
- test out DeCoslo outcomes in local contexts.

DeCoslo were able to demonstrate its success by creating learning content in one country and assemble it in another, personalising it through a different modern language and customising it with local context. Partners in Finland and Spain appear to have been particularly proactive in helping the UK partners refine their products and test out learning object assemblies. The Spanish partners plan to mainstream DeCoslo through online IT courses for the South American market.

A principal partner in DeCoslo is Autodesk (UK) Ltd. This global communication company is now planning to apply DeCoslo methodology to support online learning provided by its network of training companies throughout Europe.

Similarly the global Computer Education Managers Association (CeDMA) provided the project with up-to-date specialist advice on metadata standards derived by IEEE in the USA and other schema and extension work. The past-president was instrumental in networking the dissemination of the project's progress and work across Europe and USA.

Links with other projects

The DeCoslo project partners have been proactive in developing relationships with other projects in the field. These include:

Information Society. The partners have worked in synergy with other DfES initiatives, particularly proposals for new Foundation degree models, to stitch new ICTs seamlessly together to open up access to learners, particularly those in employment. DeCoslo has contributed to BIS and the movement towards an ISO for learning object technologies. Edexcel is in discussion with the Cabinet Office on how best to move forward in the use of education portals and learning object assembly tools.

Get Connected. Two of the partners participated in the Foreign Office IT initiative with India and gave presentations on DeCoslo in five major Indian cities. They have subsequently made return visits and are now actively engaged in a joint project with a major Broadcaster in India.

AGORA. As members of the ADAPT project steering group DeCoslo benefited from the trial of tracking system and online assessment activities. The marketing expertise of AGORA to SMEs was shared.

JISC (the joint HE/FE funding body for computer networks and information/standards) and **BECTA.** Partners have worked closely with JISC and BECTA nationally to enable FE and HE to address learning object issues. One of the DeCoslo partners has recently been awarded funding as one of 12 national interoperability projects by JISC.

MEG. Three of the partners became founder members of MEG the education, libraries and museum sector forum for networking matadata issues.

Virtual Education Action Zone. DeCoslo methodology has been mainstreamed in the school sector by some of the partners' involvement in the new Virtual Education Action Zone in SE England. Edexcel will be working with a network of teachers to develop customised e-learning materials for Key Skills.

Arriadne. Online Education Ltd in Scotland have continued close links with developments internationally through the Arriadne programme and knowledge gained through DeCoslo has been applied to the development of their Managed Learning Systems for use in the Far East.

Impact on Ufi development

The DECOSLO partnership have actively attended and contributed to debate amongst two Ufi cluster groups — Learner Support and ICT. There have been a number of meetings, joint attendance at conferences *etc.* plus, more recently regular formal and informal correspondence by email. A Ufi representative and cluster leader sits on the DeCoslo management steering group. The Ufi editorial team has visited the project more than once for advice on the implementation of standards.

At the start of the project the partners were concerned that the emerging Ufi would not go down the route of learning object technologies. However, toward the latter stages of DeCoslo the relationship with Ufi has strengthened principally though dialogue and the Ufi representative on the Steering Committee. Ufi have adopted interoperability standards partly due to the lobbying of DeCoslo partners. The need for collaboration in

metadata extensions is now understood and embedded in the Ufi concept. The Cabinet Office is also now taking these issues fully onboard.

Future development

DeCoslo is considered by the partners and other stakeholders to be a frontier project. It has achieved all the objectives it set out to do over a two year period. It has disseminated its knowledge widely in the UK and transnationally. All the partners involved in the project are now mainstreaming the learning outcomes resulting from the aggregation of experience gained. For example:

- QCA has recognised the importance of metadata tagging and as a result the National Curriculum Orders have been data-tagged on the DfES website

- DfES have also launched a Virtual Education Action Zone in the South East that is using the DeCoslo methodology

- North Lincolnshire College and Edexcel are now working with BSI in the national work to establish an ISO and the promotion of international standards for technology based learning.

- Edexcel International have set up an international e-learning research centre at Newark to take forward DeCoslo applications.

The standards and technology for content management and tagging content using metadata that have been developed can now be used throughout the UK education and training system and could influence the National Curriculum for schools as well. Significant changes in the 'mindset' of educators as well as employers and learners are required to fully utilise the metadata tagging approach. The project partners are in no doubt that the FE/HE sectors currently lack the capability to take up the opportunities enabled by metadata. The need for greater access for teachers and trainers to IT equipment and skills is widely understood. Less well known and accepted is the anticipated radical shifts in the role of educators as the sources of knowledge to that of 'farmers and assemblers". In other words DeCoslo has demonstrated that there is no longer a technical issue in developing this kind of approach. Assembling the learning content- 'content farming'- is a human issue requiring as it does a new skill set of the traditional editors of content — tutors, teachers and trainers. The partners would like to see awareness of metadata's potential built into teacher training.

A new e-learning marketplace is emerging in support of these new approaches to the development of online learning content. Intellectual property rights are no longer the issue that they were given the ease with which metadata enables the generator of a learning object to be identified, tagged and subsequently paid!

The partners would like to see Government pursue the possibility of financial incentives to schools and colleges to provide content onto the Web. Any participation schools might make to the National Grid for Learning currently offers them nothing more than brownie points. DeCoslo believes a more radical approach is needed.

East Lancashire Learning Opportunities

The project

The ELLO project was designed to improve the take up of training and education by individuals and employees in small to medium-sized enterprises within East Lancashire, particularly among businesses employing fewer than 250 people. There were three distinct aims:

- to improve labour market information to enhance the planning of education and training delivery and to identify skill needs and shortages

- to widen access to learning by providing comprehensive, accessible and up-to-date information on all learning opportunities in East Lancashire

- and to develop creative marketing approaches designed to be effective in attracting new learners to education and training.

To achieve these aims, several key objectives were identified, organised into three distinct strands of activity that ran concurrently:

Strand 1:

- ensuring that East Lancashire has an integrated mechanism for providing, analysing and sharing labour market information which actively involves the area's major providers of education, training and business support

- developing an IT-based diagnostic tool kit for identifying individual training needs and business skills requirements

- developing and implementing Employee Development Systems within East Lancashire SMEs.

Strand 2:

- creating a database compatible with Learning Direct which details all East Lancashire learning opportunities and which is widely accessible through Access Points, libraries, FE colleges, careers offices and training providers.

Strand 3:

- developing creative ways of marketing learning and to engage individuals in learning within East Lancashire.

The project delivery mechanisms drew directly on the relevant expertise within the partnership: marketing to attract new learners was clearly a role for the colleges, information networks on guidance and learning opportunities was for the Careers Service, while monitoring and addressing local skill and training needs was a TEC issue. Development of the diagnostic tool kits was to provide a linkage between the skill needs of individual businesses and the training needs of their employees. The employee development systems were to help consolidate best-practice in the management of learning within East Lancashire SMEs.

Development of the ELLO marketing plan was particularly challenging given a longer-than-expected set-up phase for the project and the perceived importance of ensuring that it complemented Ufi-development nationally. The promotional campaign included both paid advertising and free or low-cost editorial coverage. The more traditional hard-copy materials, such as flyers and posters, sat alongside electronic marketing tools such as web-based materials and screen-savers. Local events and sponsorship opportunities were organised.

Origins of the project

Although the project was specifically developed for the ADAPT Round 3, it was built on existing local activities and concerns. There was a perception locally that education and training planning did not directly spring from identifiable business needs, particularly in the small business sector. The relatively low take up of training and education in the locality at the time was well known.

The East Lancashire Partnership was a strong, maturing partnership which pre-dated the ADAPT Round 3. It provided the necessary institutional framework for ELTEC to speedily bring together the key players to effectively respond to the Call by developing a cohesive, integrated bid based on pressing local issues.

Ufi influence and involvement

The aims of the Ufi concept were well understood by the partners when developing the project and Strands 2 and 3 were specifically developed to address the Ufi's 'driving demand for learning' agenda. The perception that Ufi was a concept to be developed locally was a strong one in actively engaging the partners in something genuinely new. Indeed, it is thought to have further

cemented partnership working that might, in the past, have been hampered by local inter-organisational issues.

The recognition of possible overlaps between the proposed outputs of ELLO and the institutional development of Ufi in the area were actively addressed from an early stage. However, the partners were also very clear that they would have had severe difficulties in developing a grounded appreciation of the practicalities and possibilities of Ufi-type delivery mechanisms within East Lancashire had they not been involved in the ELLO project.

The partners made good use of linkages between ELLO and other ADAPT Round 3 projects concerned with engaging non-learners from SMEs, but Ufi Cluster Group activity was not central to that activity.

Partners

The ELLO project was managed through a partnership of local FE colleges, Local Authorities, training providers and business support agencies. The project's Management Group encompassed senior representatives from the following organisations:

- Accrington and Rossendale College (ARC)
- Blackburn College
- Burnley College
- East Lancashire Careers Services (ELCS)
- East Lancashire Partnership
- East Lancashire Training and Enterprise Council (ELTEC)
- Nelson and Colne College
- Northern Technologies/Pendle Training
- Training 2000 Ltd.
- TUC Bargaining for Skills Unit
- Employment Service.

ELTEC had overall responsibility for management of the project as a whole and led on Strand 1: the LMI and EDS work. ELCS had responsibility for setting up the Strand-2 database of learning opportunities. ARC, on behalf of the local FE colleges, led on developing the mechanisms for mass marketing and promotion of learning programmes across East Lancashire.

Northern Technologies/Pendle Training and Training 2000 Ltd. are two of the largest private training providers within East Lancashire. They sat on the Management Group as representatives of the East Lancashire private sector training

providers and played an active role in the activities of each of the three Strands. All the local borough councils contributed funding to the project.

Project management

The project was managed centrally by ELTEC as the financially-accountable body and a coherent project management structure was established early on. The central Management Group met on a monthly basis to review overall progress and agree next steps. A separate operational sub-group dealt with the many financial and contractual matters and the detailed processing of claims.

There were separate management sub-groups for each Strand, which met bi-monthly and on which the local borough councils were also represented. Progress in the Strands was monitored against the respective detailed components of the overall Project Plan and the Strand meetings were timed so that the issues raised could all feed into the main Management Group meetings.

Outturn against plans

Difficulties in interpreting and managing the ADAPT rules contributed to a slower than expected set-up phase, which also had a pronounced, knock-on effect on time-tabling and resources throughout the life of the project. To the end, clarification of ADAPT eligibility rules and the practicalities of contracting between many partners continued to stretch the project managers. The delay in finalising Ufi's branding through **learndirect** was a key additional problem for developing ELLO's public identity and in fully integrating the marketing strand early on. In addition, the pace of web development has been a key risk factor but the project's preference for 'off-the-shelf' IT solutions has been vindicated in terms of delivery and cost-savings, albeit with some delays and quality compromises.

Rather than combine the ELLO partners' existing data, an early decision to charge ELTEC with specific responsibility for generating the East Lancashire workforce development survey — to identify local skill needs and availability — ensured relatively problem-free delivery. Development of the employee development schemes was more challenging, however. But the decision to target particular sectors where new qualifications were necessary to safeguard jobs — such as the care sector — together with the use of Individual Learning Accounts to attract beneficiaries ensured that revised targets were met. Development of the diagnostic toolkits was slower than desirable.

Continuous monitoring and evaluation of project management processes has been a feature of the project, bringing to light some isolated areas of staff difficulty. Equally, however, the importance

of having committed people in key positions is thought to be the key to explaining the continuous progress of the project, despite difficult external circumstances. The process of developing a workable and accessible database of learning opportunities was similarly iterative, using 'focus groups' with the inputting providers to iron out problems. Recruitment difficulties meant that third party evaluation was less effective in the time available.

The final budget for the project is some 25 per cent of that originally planned, for four main reasons. First, virtually all of the data-input of course details by training providers was done by them at minimal cost to the project. This had not been expected. Secondly, instead of developing a bespoke IT solution for the database, it became possible to purchase a more cost-effective 'off-the-shelf' solution. Thirdly, it eventually proved to be more cost-effective to integrate the marketing strand within the general activities of the project as a whole, once the position of **learndirect** in the market place was finally known. Fourthly, it became clear that a feasible target for new learners would be some 25 per cent of that originally suggested.

Outputs and sustainability

ELLO was attempting to drive demand for learning in East Lancashire at a time when the launch of Ufi, and the possibility of a cross-cutting campaign, was imminent. However, isolating the ELLO focus on the *concept* of lifelong learning, rather than particular ELLO or Ufi products, helped to ensure there was no competition with the Ufi campaign, only possible overlaps.

Identifying clear images and case studies of 'ordinary people' within the ELLO marketing literature encouraged the message that the target audience for learning was everyone in East Lancashire. Building a sustained campaign in the local press and through creative leafleting during 2000 helped to reinforce this message. And ensuring that there was appropriate personal support and encouragement available, be it within the workplace through advisers attached to employee development schemes or in local strategic places such as job centres, careers points, libraries, community organisations and business support agencies, had the best potential to turn non-learners towards learning. The idea that learning could be both fun and generate alternative career paths were key themes of the campaign.

A major achievement of the project, however, was the development of the web-site and intelligent database containing a virtually comprehensive listing of skill needs and learning opportunities in East Lancashire, including Ufi material. This is branded as; '*go-for-it − the future of learning is here − are you?*' [www.go-for-it.org.uk]. Training providers can routinely update this database on line in a single-keying operation that also updates their local sources. There is every incentive for them to do so

because it helps to generate business and it costs them very little in the process. Setting up the infrastructure for this to happen is a key legacy of the project.

Learning North East

The project

The project was originally designed to prepare for mainstreaming the Ufi concept in the North East region and its vision was 'to be the natural choice for North East people who want to access learning to improve their skills'. Its aims, according to its strategic plan, were to:

- work at the leading edge of innovation as a broker of learning and as a catalyst for change in the provision of learning

- represent a new face of relevant and flexible learning

- establish a service which is customer-focused and makes learning more accessible

- add value to existing services and provision.

The project was required by ADAPT to change direction after about a year of operation (see later) but, as originally envisaged, the project was first and foremost about getting people into learning per se. It was not primarily about developing new delivery modes. It aimed also to increase the range of flexible learning opportunities available to learners through the commissioning of new products and the identification of gaps in the market.

The original Learning North East model, and the one which was being developed during the first year or so, involved:

- access for would-be learners to an impartial 'learning brokerage' service, in two ways:

  - a free telephone call to the LNE call centre connected individuals and companies to information, advice and direct booking onto suitable provision, including a promotional range of free 'tasters'

  - alternatively, access to the information and on-line booking could be made direct via the Internet

- the information on provision available being held on a website database and able to be updated on-line by providers, who thereby take ownership of their information

- a network of community-based and company-based learning centres
- the database would be developed to have an 'intelligence' which would prompt the call centre to 'progress chase' and offer follow-up provision. It would also identify gaps in provision, and collect customer feedback information
- a facility for 'market making' by informing providers about gaps in provision and other customer (individual or company) issues and needs
- access to information and advice for SMEs via a network of nine Learning Development Advisers (LDAs) who proactively market 'learning' to them.

In line with ADAPT eligibility requirements, the project was aimed primarily at employees and managers of SMEs but they were to be targeted both as individuals as well as companies. The marketing strategy included the use of: mass marketing to individuals, identifying who of those responding are SME employees, specific marketing to companies via Chambers of Commerce and other SME agencies: trade unions and community influences such as clubs, shops, schools *etc.*, specially-employed Learning Development Advisers working with SMEs; and the establishment of strategic partnerships with the local and regional media.

Origins of the project

The Labour Party first outlined its concept of the University for Industry (Ufi) in 1994 when in opposition. Two years later the Institute for Public Policy Research (IPPR), an independent 'think tank', published a blueprint for Ufi which received widespread support, and the University for Sunderland decided to pilot central aspects of the Ufi concept in the North East. The first phase of the pilot project ran from September 1997 until July 1998.

The main local partners in the 'Sunderland Ufi' pilot project were the University of Sunderland, the City of Sunderland and Sunderland TEC, all of which provided funding, plus a local Internet development firm which provided a great deal of free time and expertise, and three FE colleges. Gradually the number of partners involved grew to 60. When the original pilot phase ended, all partners agreed to contribute funds and/or other resources to keep the project going and to extend its geographical boundaries, in the belief that they were investing in a Ufi for the North East. When the possibility of substantial European funding was announced, the original partners led over 100 local, regional and national organisations in developing the bid for ADAPT 3 funding of 'Ufi North East' which was later, in March 1999, re-branded 'Learning North East (LNE)'. These included the other North East TECs, universities and FE colleges, the Open

University, National Extension College and the Northern Development Company.

Thus, prior to ADAPT funding, a service was already being provided to learners via the Sunderland Ufi pilot, including a number of improvements made to it after the pilot phase ended in Summer 1998. So, Learning North East would have developed without ADAPT funding, though perhaps with fewer partners involved, and it would not have been able to test out a number of the important innovations which were an integral feature of this ADAPT Round 3 development project. On the other hand, without ADAPT funding, it would have been free to retain its strategic focus on mass marketing and the individual learner, rather than having to abandon the former and concentrate almost entirely on SMEs.

Progress to date

Because of delays at the beginning and because the roll-out of national Ufi had implications for its development, the project was offered a six months extension to June 2001, thus no end-of-project report can yet be produced. The full project team was not in place until November 1999, 10 months into the project.

As described above, pre-ADAPT funding the Sunderland project was piloting what was then assumed to be the Ufi model, and it was believed, when the ADAPT project was approved and the Sunderland-based project expanded and became '*LNE*', that LNE would become the Ufi in the North East. Now, however, there are five Ufi hubs in the North East, but LNE is not one of them. Under the criteria outlined in the Ufi Bid Prospectus, Learning North East was unable to submit a bid to become a Ufi geographical hub as bids were restricted to the Local Lifelong Learning Partnerships.

The project was told in January 2000 that it should not be using any ADAPT resource for mass marketing, and that much of its activity thus far had been ineligible. Because it had no way of **proving** that people who started learning following contact with the LNE call centre were unemployed, at risk *etc.* (*ie* ADAPT-eligible), then it could not apportion them and could not therefore claim them as eligible beneficiaries.

So, it had to curtail mass marketing and shift its focus very significantly away from marketing to individuals towards encouraging SMEs into learning via its team of peripatetic Learning Advisers. This switch significantly altered the nature of the project and it caused difficulties with partners (colleges, learning centres etc) because suddenly a key motive for supporting the project was being denied when they saw that LNE was not going to be Ufi for the region, and that LNE could not mass market. Though the LNE call centre still does receive

enquiries from the public because its existence is well-known, in the absence of continued mass marketing the prospects of a big increase in partners' business volumes were reduced. Despite this, however, the great majority of partners have stayed on board because of the other benefits which they derive from participating in it.

Progress on phase 2 of the ICT system was brought to a halt when the project was told that it needed to move away from the mass learner market and redirect that effort towards learners in SMEs. Phase 1, the development of a new website, was completed in early May 1999 and included several significant improvements on the website used during the original Sunderland Ufi pilot *eg* more attractive and user-friendly interface with learners, facility for providers to update their information on-line *etc.* The website was further enhanced in September/October 2000. Phase 2 was to have been the development of an 'intelligent' ICT system which would, for example, prompt the call centre to contact callers one or two weeks after initial enquiry or issue of a welcome pack, generate information on gaps in provision by comparing requests with provision listed on the database, and track completers to suggest further learning or if provision they had requested becomes available.

There has been significant development of the ICT system in order to meet the specific learning needs of the SME market:

● Customised Solutions System, a database of public and private sector training providers

● Learning Adviser Reporting System, an integrated system which facilitates the recording of all data required for ESF/ADAPT purposes as well as analysis and reporting on LMI data.

Much of this development was unforeseen at the beginning of the project. The concept of the original course database was for funded (largely FEFC) provision and was designed for the mass market. However, the project has found that SMEs largely request customised bespoke provision which many FE and HE institutions find it difficult to respond to quickly.

In terms of meeting the original SME learner targets, it is seen by those involved as a very successful project which had met its target by September 2000 with nine months to go. By January 2001 it had helped over 6,200 learners from SMEs.

Project evaluation

The evaluation framework had to be amended because of the shift in emphasis of the project towards a greater focus on SMEs. Thus, the attention paid to issues around mass marketing and the

interface between the public and the call centre etc was reduced significantly and the evaluation concentrated instead on the processes involved in working with SMEs *ie* how Learning Advisers (LAs) contacted SMEs and what was then done, once an SME's needs had been identified, to arrange a solution. The evaluation (to February 2001) had involved interviews with Learning Advisers, LNE call centre staff etc and a telephone survey of 100 SMEs. Other evaluation work up to the end of ADAPT funding in June 2001 is expected to focus on marketing, commissioning of learning materials, experiences with and views on the newly commissioned products, and partnership processes, plus focus groups of learners from SMEs.

The telephone survey of SMEs indicated a very positive response by them to the Learning Adviser service with, for example, 2 out of 3 saying that the Learning Advisers had furnished them with new information about education and training opportunities available and relevant to them — without their help, it was said that the SMEs would not have known where to look or what to look for. The SMEs' experiences were seen to have been more positive than might have been expected given the usual reaction of SMEs to business support services.

The evaluation also looked at the way in which the identified needs of SMEs were met. Many of these needs were very bespoke, short-term, and needing to be met on-site and to tight deadlines etc, and more of the SME needs than was originally expected were met by private sector providers. This caused some issues for some original partners who had difficulty accepting that more of the business did not come to them.

Impact on Ufi development

The project was built on experience from the Sunderland pilot which was explicitly designed to test out the Ufi concept. The project's original aims and objectives were directly linked to the aims and objectives of the Ufi concept, and in terms of its contribution to the development of Ufi, the LNE project was expected to deliver experience of and lessons relating to:

- the use of mass marketing to reach SME employees
- the use of Learning Development Advisers to engage SMEs
- the use of community-based and company-based learning centres
- an intelligent ICT system incorporating features which have not been tested in this context before
- the piloting of on-line enrolment.

As described above, the emphasis of the project changed as it developed but, nevertheless, those involved believe that a number of important lessons have been learned of relevance to Ufi, including:

1. A belief that Ufi is too far ahead of many of its potential clients in the use of technology in learning *ie* those who are disengaged from the learning system, and many SMEs who are not yet ready for the on-line approach, particularly the very small ones who need help to get engaged in learning but who may not have much in the way of internet-enabled computer hardware or software. Hence, LNE engages them on the first step of the learning ladder via print-based materials or CD-ROMs if they are a few rungs further up that ladder.

2. Many of those who really need to be coaxed into learning can be helped by the LNE approach but, it is believed, not by the **learndirect** approach. The LNE call centre can refer them immediately to an appropriate provider or furnish them with other information, and it can also send them a free taster, or chase up queries to identify where the learner can find the help needed etc and then phone the enquirer back with that information — often local knowledge is required. **learndirect** does not provide that level of service and therefore '*does not help in removing some of the barriers to learning*'.

3. Hence, there is a good case for sub-national brokerage (for individuals and SMEs) and LNE believes that Ufi should develop in that direction. Perhaps local IAG services would be well-placed to provide a local brokerage service if they had access to the **learndirect** database to which they could then add local knowledge about geography, transport etc. Calls to the national freephone number could be transferred to the local IAG service.

4. Another important learning point is that to meet the needs of SME learners requires a provider base much larger than the traditional college/training provider one — many of those identified by LNE have been in the private sector. Thus, to meet the demands of the SME market which typically is low volume, fragmented and often highly specialised, there needs to be a 'mixed-economy' of provision.

5. Individual SMEs can have learning needs that are fragmented, unpredictable, immediate, specific and small scale in terms of numbers of individuals needing the learning and if most providers cannot/will not meet that need, how can that need be met? Maybe at a less local level (eg sub-region/region), there are others with a similar need but who knows that, and who can cluster them together? There is perhaps a need for a mechanism beyond the Ufi hub level but below national, which could identify and meet local needs whilst reaping the advantages of collaboration.

6. Engaging SMEs under 50 requires a different strategy to capturing larger ones. LNE believes that its model which has

used Learning Advisers has been very effective, and that Ufi needs its own SME 'sales force' which would proactively market to very small enterprises or perhaps local IAG services should have a Learning Adviser-type function to work with SMEs.

Overview and future development

The project did not develop as planned. The original intention was that it would target the mass market, including a substantial number of SME learners, but ADAPT eligibility requirements meant that it had to abandon large parts of its marketing strategy and focus very much on SMEs. It also had to switch attention away from some of its planned ICT developments, in particular the development of an '*intelligent*' database, and put more effort into building a system which would allow its peripatetic Learning Advisers, working with SMEs, to communicate speedily with the project's centre about an SME client's learning needs and the provision of a customised solution. Nevertheless, a significant number of achievements were identified

LNE believes that it would be very unfortunate if all that it has learned and done in the last couple of years were lost, and if all the experience and expertise of the people involved (Learning Advisers, call centre staff etc) were dissipated because they have to leave when their fixed term contracts expire. LNE is working on an exit strategy.

LNE would like to see continuation of a regional service to the mass market, and of the Learning Adviser service, including provision of a single regional point of access to learning and training for SMEs, and the development of a service which groups SME learners together for reduced-cost access to learning and for the creation of learning clusters.

NetGAIN-Learning

The project

The NetGAIN-Learning project was designed to support improved entrepreneurship in micro-businesses in the arts and entertainment sector, where individuals with high craft skills tend to work non-traditional hours in non-traditional settings. The project created support structures and learning and guidance tools to enable individuals to develop the ICT and entrepreneurial skills needed to sustain their employability in this environment. NetGAIN-Learning focussed on the following:

- assessing the sector's needs for the provision of training in ICTs and business skills targeted at SMEs and their freelancers

- designing a flexible, easy-to-use, multi-media guidance and learning environment for the acquisition of the identified skills, based on National Occupational Standards and equal opportunities best practice and delivered through the development of national on-line materials with both on-line and off-line support

- undertaking two thorough pilots of the new learning materials and support systems

- driving the demand for learning by disseminating and marketing NetGAIN-Learning throughout the sector and beyond, drawing on existing and new European partner networks.

In summer 1999 the project piloted, reviewed and then, in summer 2000, re-piloted the ICT-based learning framework through a series of regional 'Gateways' across the UK — West Midlands, East Midlands, London, and the South West/Wales. Some 160 beneficiaries from arts-based SMEs and micro-businesses were targeted for involvement in the two pilots, with the majority of those entering the programme achieving an NVQ unit Level 3. Aside from providing contrasting regional locations to pilot the materials, each of the Gateway regions was selected on the basis of their stated commitment to making the NVQ system work, to multiculturalism and rurality, together with their ease of access to technology-based equipment. The NetGAIN-Learning website proved to be of key importance to project activities in

most Gateways, although the focus at Arts Training Central was specifically on off-line support materials.

The technical infrastructure was common, but each Gateway area tailored the materials to their own local requirements, by targeting particular types of beneficiaries and/or focusing on a particular range of NVQ units. For example, the Chapter Arts Centre in Wales focussed on a mix of beneficiaries — both young and more experienced - from urban and rural locations. Jubilee in the West Midlands focussed on Community Arts in an urban context. The learning materials developed for the project embodied a range of accredited business competences, covering 27 units taken from 12 NVQ/SVQ's. The units were grouped under the following broad headings: planning and evaluation, securing finances, finance, marketing self/organisations, procuring services, teamwork, and learning and personal development.

Origins of the project

Although the project was specifically developed for ADAPT Round 3, it built on previous DfES-funded research by METIER — NetGAIN-Guidance — into the skill needs of recent graduates about to enter the arts and cultural industries. A key conclusion of that work was the clear need for business-related skills in the sector and the need to prioritise a design format for web-based delivery of guidance and learning materials that emphasises informality of access, longer-term career development and validation. Key driving forces for the project were both access to relevant learning for the sector per se and access for people with disabilities in particular. METIER's emphasis prior to the project was in developing the National Occupational Standards, which fed in to the development of Scottish and National Vocational Qualifications. NetGAIN-Learning emphasised the need to build the capacity of learning support centres, to enable the new learning materials being created to support the implementation of the National Occupational Standards at work.

METIER first identified the potential of further developing NetGAIN from the ADAPT Third Call and co-wrote the application with assistance from PREVISTA, its specialist sub-contractor. The influence of the Call was to modify the initial idea, in terms of the target beneficiaries and the focus on transnationality. There were already well-established links with what became the Pilot 1 Gateway partners, two of whom had been considering doing an ADAPT bid on their own - although none had been involved in previous ADAPT Calls. And when one of these felt they had to withdraw before Pilot 2, it was relatively unproblematic for METIER to find a more than willing replacement.

Ufi influence and involvement

The concept behind Ufi was well understood by the partners when developing the bid and the potential to develop that concept through the project was important in stimulating initial interest in putting a bid together. The likely lessons for the development of the Ufi concept from NETGAIN-Learning are articulated in terms of learning materials design and access for various groups: disabled people, freelancers and for those working non-standard hours in non-standard circumstances — within the context of learner-mapping. Access issues were analysed in terms of: the learning environment; content; style; language; design; cost; value-added and fitness-for-purpose.

There has been clear recognition by METIER throughout of the potential of the NetGAIN-Learning on-line materials to be branded as Ufi Ltd products and of the importance of the Ufi concept in assisting with developing access to the arts and entertainment sector. The question of ownership of learning materials was identified early on as a major challenge for all parties in this area. The NetGAIN Guidance materials have been submitted twice for Ufi endorsement, as yet without success. METIER themselves suggest that the appropriate meta-tagging of learning materials to permit the more effective use of the main search engines and online marketing strategies may be a particular issue that should be addressed.

Although a Ufi ADAPT-3 Cluster Group was identified for the project based on its 'learner support' theme, a more industry-specific focus for experience-sharing was always thought (by METIER) likely to produce more direct benefits. The industry-specific focus of learning — thought to complement the individual approach of **learndirect** — has since been effectively advocated by METIER and other NTOs within the Ufi Taskforce.

Partners

The project has been led throughout by METIER, assisted by PREVISTA, and the two pilots were implemented by key partners in the regional Gateways across the UK, charged with building a sustainable and fully accessible local infrastructure for the future. METIER provided the important administrative and management linkage between the centrally-procured Gateway-support services - the evaluator, the IT/web-site support, the learning materials designers and the equal opportunities design and support facility — and the Gateway partners themselves. The Regional Gateways were:

Pilot 1:

East Midlands:	Arts Training Central (ATC), Leicester
West Midlands:	Jubilee Arts, West Bromwich; Arts & Media Training Consortium (AMTCC), Coventry
South West:	Arts Training South West (ATSW), Taunton
London:	Weekend Arts College (WAC), Kentish Town

Pilot 2:

East Midlands:	Arts Training Central (ATC), Leicester
West Midlands:	Jubilee Arts, West Bromwich; Arts & Media Training (AMT - renamed), Coventry
Wales:	Chapter Arts Centre (CAC), Cardiff
London:	Weekend Arts College (WAC), Kentish Town

Arts Training South West (ATSW) withdrew before the second pilot, partly due to the local impact of reorganising the South West Arts Board, but also to NetGAIN-Learning-specific factors such as financial uncertainties surrounding the ADAPT eligibility rules and technical uncertainties to do with developing the new web-site. Chapter Arts Centre (CAC) in Cardiff replaced ATSW for the second pilot, but as Jubilee had, meanwhile, been upgraded to become a full Gateway, CAC was accepted as the new 'half' Gateway. Within each Gateway region a wide variety of additional partnerships have been developed which assisted in accessing beneficiaries, providing private match support and, in some cases, with sustainability for the future.

METIER has developed significant transnational partnerships with 11 European organisations, where the role of the regional support infrastructures provided by the Gateways in overcoming barriers to learning has attracted significant interest.

Project management

The project was managed by METIER as the financially-accountable body and its Head of Lifelong Learning was the project co-ordinator. PREVISTA worked under contract to METIER to provide research, learning materials, web design and project management advice, together with capacity building support to the Gateways. The implementation plans of the Gateways together with formal partnership agreements formed the basis of their contracts with METIER.

Meeting as a group for the first time in October 1998, the partners subsequently met on a monthly basis, the location of the meetings

being rotated around the Gateway regions. The strategic and more locally-based implementation functions of the monthly meetings developed over the life of the project as the partners became more involved. And what were to become 'development days' for all partners eventually had a roving brief over all aspects of the project.

Project management has been much more resource-intensive and less predictable than originally planned for two main reasons. First, the application of ADAPT3 eligibility rules for beneficiary funding were more complex and difficult to routinise for project conditions than anyone could have envisaged beforehand. Secondly, the rapid pace of software and hardware development over the life of the project meant that an intensive yet flexible management approach was necessary to maximise the effectiveness of decision-making.

Outturn against plans

The importance of developing a common understanding of project objectives and effective administrative arrangements between METIER and the geographically-dispersed regions contributed to a longer than expected set-up phase. Issues concerning the recruitment of beneficiaries and clarification of the ADAPT eligibility rules not only loomed large in the beginning but also had a significant, knock-on effect on time-tabling and resources throughout the life of the project.

Development of the learning materials themselves and of the Gateway infrastructure — people, premises, equipment *etc.* — generally proceeded to plan. The exception here could have been Chapter Arts, who joined only for the second pilot, but their local capacity and computing expertise was such that their induction was almost seamless.

However, the on-line learning environment itself proved far more difficult to realise. The lack of 'off-the-shelf' software for developing the web-site encouraged the search for a bespoke design that turned out to be both costly and relatively ineffective as a tool for interactive learning. And protracted legal argument about intellectual property rights to the bespoke software with the IT consultants further underlined possible future difficulties. Happily, developments in web-software meant that a limited number of effective off-the-shelf solutions became available in time for the second pilot, permitting the on-line environment to be finalised. The benefits of proven packages were in having all the requirements — learner tracking, chat rooms, on-line seminars, beneficiary showcase or presentations, flexible learning materials, external links — while still retaining *some* control over the visual and graphical interface. Rescinding some design control was, at the time, considered worth it.

Recruitment of both the evaluation and equal opportunities consultants took longer than expected, but came together with the finalised web design to allow the lessons from the first pilot to feed directly into the second pilot. Recruitment of beneficiaries and establishing local access to ICT services initially proved to be easier than had been feared, although the out-turn was more mixed across the Gateways, particularly for disabled beneficiaries.

All 11 transnational partners became involved in NetGAIN-Learning through one of the established sector networks, but sustaining their involvement was highly resource-intensive for METIER - out-with the ADAPT funding.

Outputs and sustainability

NetGAIN-Learning was piloting the development and delivery of an on-line programme when the practicalities inherent in on-line learning per se were still being actively addressed at national level. The project's experience of the difficulties of accessing and using learning programmes on-line will provide valuable lessons for the future. The project's effective advocacy of a sector-level approach to learning as a complement to **learndirect**'s individual level focus, is directly relevant to development of the Ufi concept.

The capacity-building — people, equipment, premises, and *practices* — of the regional arts Gateways has been a major achievement of the project. The previous tendency to be grant-driven, short-termist and dependent on the Herculean efforts of particular multi-skilled individuals has given way to a sophisticated and recognised lifelong learning operation, capable of providing longer term support to actual and potential beneficiaries.

Scottish Learning Network

The project

The Scottish Learning Network was perceived by those involved as the first learning-related platform which aimed to harness all aspects of Scotland's learning industry: information sources, provider and course details, learner and tutor interaction, and the development and delivery of on-line content.

The project's main aims, as originally stated, were to:

- stimulate and deliver learning to employees of SMEs who are low-skilled and at risk of unemployment, and people who have recently been made unemployed

- ensure, as far as is practicable, access to learning for these target groups, through the development of public access learning centres

- ensure potential learners have access to information on course content so that they can make valid, informed learning choices which will enhance their current skills and knowledge and therefore their employability

- encourage the SME workforce to improve their skills, through the development of workplace learning centres and the provision of appropriate learning opportunities

- supply learning providers with a range of tools which will facilitate their development and delivery of on-line learning.

The Scottish Learning Network (SLN) aimed to create an interactive, integrated learning network of community-based, SME-based and home-based learning centres, supported by an on-line tutor network, and linked to an open access, central web-based learning platform which would:

- provide a database of learning opportunities up-dated remotely by learning providers

- allow users to link directly with learning providers' own web sites and directly to on-line learning,

- provide on-line guidance, and point to web sites of other organisations offering guidance services

- allow learners and tutors to manage all learning processes within the web site *eg* by creating an on-line portfolio, on-line interaction between tutors, learners and peer group learners, and on-line assessment

- provide tutors with a 'framework' to develop on-line courses, without technical skills and knowledge

- allow tutors to work on-line towards a tailored award in On-line Tutoring.

All learners using community-based Learning Centres would have access to a local CD-ROM resource which would allow those who have had little or no previous computer experience to address their ICT skills deficit off-line. Learners would not only require Internet/Email skills but also would need to develop PC-based skills in order to deliver 'evidence' for their qualification(s) to their tutor. Similar provision would be made to SME-based beneficiaries through a 'library' facility offered by SLN. Home-based learning was originally expected to feature significantly in the project, but with the agreement of the ADAPT unit the relevant targets were later abandoned altogether based on evidence that a much smaller proportion than anticipated of the unemployed and low skilled client group had internet-enabled PCs at home, and that it was therefore an inappropriate target.

Learners were to be supported by a network of tutors qualified in a newly-established SQA award in on-line tutoring/ mentoring. Though there would be on-line access to tutors and the web-site and to some on-line learning materials, given the scarcity of readily-available, quality on-line materials and the inability of the project, without major expenditure, to fund production of such materials, it was always envisaged that the bulk of learning would actually be done off-line using multimedia CD-ROM material.

It was envisaged that the services offered via the web site to both learners and tutors would form significant elements of the innovation within this project. Learners would have their own 'space' within the SLN website, allowing them to store and manipulate data in various ways (CV writer, Portfolio Builder *etc.*). Tutors would be given the facility to develop on-line content using an easy-to-use, on-line tool available on the SLN web site. This would increase their skills in developing on-line content and allow them to test that content with the target beneficiaries.

The primary target groups were those in employment within SMEs and at risk of redundancy because they have skill levels less than SVQ Level II or equivalent, and those who had become recently unemployed from SMEs and who had similarly low levels of skills. The target groups were selected largely to meet ADAPT eligibility criteria and it was expected that when ADAPT funding ceased, the client group would be widened. Although no particular sectors were to be excluded from the project, it was

intended that it would in particular consider the needs of sectors that have a poor record in terms of participation in learning, particularly amongst small employers, *eg* Care, Retail, Tourism and other services.

Origins of the project

The original idea for developing, across Scotland, open access learning in a non-institutional environment through the use of Information Communications Technologies, stemmed from initiatives by Grampian Enterprise (Grampian's Local Enterprise Company (LEC)) which opened several neighbourhood learning centres in 1996. Later, a Learning Technology Information Group (LTIG) was established involving all 13 Scottish Lowlands LECs. It excluded the 10 LECs which were at that time heavily involved with Highlands and Islands Enterprise in setting up the University of the Highlands and Islands. LTIG began to work up proposals to present to Scottish Enterprise (SE) for funding the development of provision similar to that in Grampian across the LEC network in the lowlands. When bids were invited for ADAPT funding of Ufi development projects, this was seen as a way of funding a much larger initiative than SE and the LECs could support on their own. SE and the individual LECs were then approached to contribute matched funding in order to lever in significant European resource.

In addition to the 13 Scottish Lowlands LECs and Scottish Enterprise, other partners in the project include the Association of Scottish Colleges and the Scottish Council for Educational Technology. British Telecom plays an active part, providing advice and support and attending meetings of the management group. The Scottish Qualifications Authority funded the design and development of the new qualification for on-line tutors.

Progress to date

The project was given the final go-ahead in April 1999 after a six months approval process. In December 1999, because of the late start, it was granted a six months extension to end-June 2001. At the time when the extension was granted, the management team decided to keep the profiles of beneficiary numbers etc as they were, but the extension meant they would have more leeway if they failed to keep on target. The extension also meant that there was more time for a handover to the Scottish University for Industry (SUfi) which began operations in September 2000.

At the time of writing (late March 2001), the project had reached or exceeded a number of its targets but others had been revised downwards in agreement with the ADAPT unit. The reasons for the revisions were very largely related to slower than expected

completion by staff in FE colleges of the new on-line tutoring qualification which had been developed for the project. (The non-FE sector has produced the numbers expected of it). The new SQA on-line tutor award, 'Providing Online Support For Learners', was completed on target in July 1999, and the relevant training materials (funded using ADAPT monies) and an on-line version (funded by the LEC network) were produced. Delivery of the award, which was accredited as a Higher National Unit by the Scottish Qualifications Authority, began in a number of Approved Centres around Scotland later that year.

The lower than expected completions of the new award amongst FE staff had a knock-on effect on the number of individuals registering for learning via SLN at community learning centres because the latter have not been able to offer the on-line tutor support expected, and because qualified tutors were expected to recruit many of them. It also has had an impact on the number of SME learners because FE staff, once they qualified, were expected to generate interest amongst their SME contacts in learning via SLN. However, that impact was less because newly-qualified tutors in non-FE institutions were expected to have more contacts with SMEs and the potential learners within them, and this proved to be the case.

The latest projections for the end of the project at end-June 2001 are:

- 600 tutors completed (cf original target of 1,000 qualified by December 1999 — that number will eventually be reached but not by June 2001). There were in fact, at mid-March, 743 in progress, and 200 already fully qualified on-line tutors

- 400 SME learning centres (cf original target of 500 by June 2000)

- 3,000-3,500 learners (cf original 5000 by March 2000), including 2,800-3,000 SME learners (cf original SME learner target of 3,500)

- 220 community learning centres (cf 100 target) — the target was reached in early 2000 and it is not expected that many more will be added before end-June.

Project evaluation

The original intention was that there would be a quantitative and qualitative element to all aspects of the evaluation work *ie* with tutors, beneficiaries, employers and learning centre staff. However, the quantitative element has really only worked in respect of tutors, and even there with only partial success.

The quantitative evaluation was to be on-line and continuous, with the four categories of participant providing on-line feedback as they enter, undertake and leave rather than capturing a group of them at one particular point in time eg tutors when registering

on-line for the award, at the end of their training and some months after qualifying, would be prompted by e-mail to answer questions on-line about previous expertise with IT, rating of training provided, experience of working with learners, difficulties encountered etc. The e-mails would direct the respondents to the special evaluation node on the SLN web site where the questions were displayed. When ready, the evaluators would simply press a button and all the answers would be downloaded and analysed.

However, the plans for the quantitative element had to be substantially altered for three reasons: a) the much longer than anticipated time it has taken for a substantial number of tutors to complete the award, as explained earlier, has meant that it is only recently that the project has seen significant numbers of learners and SMEs *'come on board'*; b) a surprising number of those coming forward for the tutor training have not had the internet skills to make them feel at ease in taking part in the on-line evaluation, and some have not had ready access to the necessary hardware; c) the SLN website itself has not worked as well as expected in the evaluation context because some would-be tutors have had difficulties registering for the qualification and some learners have had difficulties with the website.

Therefore, the quantitative work which has fed into the formative evaluation has been restricted largely to the feedback from tutors. It was decided some months ago that, given the numbers of learners and SMEs recruited during 2000, there was little point in doing any formative evaluation work with them, and to move straight into the qualitative, summative evaluation *ie* to focus on deriving lessons *from* the project rather than *for* the project. Thus, the evaluators have just started (in March 2001) interviewing and holding focus groups with learners, SMEs and community learning centre managers. The summative evaluation element will be completed by the time the project finishes at the end of June.

Feedback from the evaluation work has been provided on a regular basis to the Project Management Group: the evaluators have attended the regular meetings of the PMG.

The evaluators will also be carrying out a review of project management by talking individually to those involved in its management. It is believed by those involved that overall the way in which the project has been managed has worked well, including the bi-monthly (and in the last year monthly) meetings of the relevant LEC managers as the Project Management Group, the regularity of which has created a good team spirit.

Impact on Ufi development

The University for Industry concept is being developed separately in Scotland. The connection between Ufi and SLN is via the

Scottish Ufi which is well-informed about the project via its attendance at meetings of the SLN Project Management Group. The main ways in which the project was expected to contribute to Ufi was through:

● developing an on-line tutor award

● testing web-based or on-line tutor support/ assessment

● testing marketing devices for encouraging SME involvement and participation by a client group not 'tuned in' to learning.

A number of important lessons have been learned of relevance to Ufi, including:

● It was claimed that many employers and individuals, and many in the FE sector, are not yet ready for on-line learning, in terms of the skills required, and the confidence and discipline in using it, and that the Ufi/SUfi pace of development is too fast for them — '*Evolution not Revolution'*.

● Related to the above, it was believed that until people become much more familiar and comfortable with on-line learning and on-line tutor support, the latter will need to be backed up for many people by an element of telephone and face-to-face support, '*until they can be weaned off it. It is important to ensure that more on-line learning products are made available, but the necessary back-up must be there also'*.

● The monies and the expertise required to produce good quality on-line content are substantial and beyond the means of most projects.

● There is a real need for industry standards and national protocols to be agreed for on-line tutoring support *eg* in relation to response times, and Ufi/SUfi could and should be important catalysts in getting those written and adopted.

● There is a real need for proactive marketing interventions to get to the SMEs and the low/unskilled and other '*difficult*' clients, and it has to be accepted that it is resource intensive, often requiring face-to-face explanation of the potential benefits — '*Ufi ands SUfi* should *target those groups, as that's where the market failures are'*.

● Non-FE training providers have been more ready to see the need for, and potential commercial benefits from, acquiring skills and expertise in on-line tutoring and learning, and their staff have more existing internet expertise and better access to the relevant hardware, plus much better access to the SME client base, and are more willing to embrace the new methods of learning. For these reasons, it was said that Ufi and SUfi needed to engage with the FE sector to identify its concerns with respect to on-line learning.

● The SLN website was an ambitious project and some tutors and beneficiaries have had difficulties using it *eg* being

automatically logged off if they lingered too long on any one part of the registration process — *'Learners, SME managers etc need websites that are very simple'*.

- A lesson which is more to do with project bidding etc, and perhaps more for ESF than directly for Ufi, relates to the *'endemic over-optimism in the setting of targets — why does it always happen, is there something wrong about the way in which bids are invited and assessed?'*

Overview and future development

This has been an ambitious and wide-ranging project with a number of significant achievements, in particular the number of SMEs and SME learners brought into PC-based learning, the development of the new qualification in *'on-line tutoring'* and the creation of a growing network of qualified on-line tutors which will continue to benefit the learning industry in Scotland well beyond the life of the project. In addition, a number of individuals in the Netherlands have been undertaking the On-line Tutor Support Award as part of the transnational aspect of the SLN project, and arrangements are in place to evaluate their experience and assess the appropriateness of the Award and its value to others in Europe.

The degree of success of the project has been influenced by much slower than expected completion of the tutor award by FE college staff, and by ADAPT's financial arrangements, matched funding definitions and eligibility rules which have limited the usefulness of the lessons learned to the development of the Ufi concept.

A number of options are being considered for when ADAPT funding ceases at end-June 2001, including migration of different aspects of the project into the SUfi and/or SE infrastructure.

Tackling basic ICT skills and providing effective off-line support mechanisms (such as through the regional Gateways) have been shown to be crucial in complementing developments in the on-line environment to provide the most effective learning for a fragmented sector.

The success of the project on these dimensions has increased the profile of lifelong learning for the sector and is now helping to forge new local, national and international partnerships aimed at tackling shared technical and other interests to provide effective sustainability. Active discussions between the NTOs and Ufi are assisting this process, as will the development of new funding streams through EQUAL, and the New Opportunities Fund.

Skillsbuild: The Basic Skills Improvement Kit

The project

The Skillsbuild project has been undertaken by a consortium led by the Basic Skills Agency. It aimed to develop a framework for the delivery of basic skills training, based on comprehensive and authoritative ICT materials and delivery support. It has developed a structured programme of assessment, training and accreditation in literacy and numeracy, delivered through a range of information and communications technologies. It has also provided a companion programme for the training of trainers, employers and workplace mentors and coaches, in the use of these materials.

Project origins

As the leading agency in the field, BSA has been aware of the failure to exploit ICT potential in this field thoroughly. There have been plenty of initiatives in the past, which have tried to wed basic skills training with computer-based presentation, but these have tended to be local and partial. Thus, although there presently exists a plethora of basic skill assessment and training materials/models, this project aimed to provide:

- the consistency, integration and thoroughness which the previously available materials lacked
- a strong built-in emphasis on ICT throughout
- extensive use of teaching materials derived from real employment contexts, and
- consistency with the Ufi Ltd basic skills sector model.

The project has also tried to fill some evident gaps in provision; *eg* no effective programmes have previously been developed to address basic skills shortcomings specifically in SMEs, nor has the use of ICT marked a very significant shift away from course, or institution, based provision.

BSA has been the main mover in developing the idea, but has worked previously with the other partners, and their interests have also moved the idea forward.

Aims and objectives

Five main activities were planned, as follows:

1. an audit of expert practice within the EU

2. the development of a computer-based entry assessment and guidance programme

3. the development of an ICT-based package of basic skills training materials, commissioning new content where necessary

4. providing training for 300 staff (trainers) in the use of these materials, and

5. piloting the delivery of the training in 200 SMEs, involving 600 employees.

Further evaluation and dissemination activities were devised to support these substantive aims.

Partners

A strength of the project has the combination of partners with specific and established expertise in the basic skills area, and their orchestration in a rough sequence to contribute this to the design, development and piloting of the materials.

There is evidence of a pragmatic re-alignment and revision of roles as the project has developed. Thus a new partner (NFER Nelson) offering specialist skills in the area of diagnosis was brought in, while close links have been maintained with other organisations and projects with an interest in basic skills and ICT.

However, at the heart of the project, three key partners have taken forward the main activities in a sequence, 1) specifying what the assessment and training kit should do, 2) incorporating this into working software programmes, and, 3) recruiting and training tutors to deliver the programme, and 4)field-testing them with SMEs and individual beneficiaries.

The Basic Skills Agency is the national development agency for literacy, numeracy and related basic skills in England and Wales, and has been responsible for many of the major developments in workplace and adults programmes in the UK. It provided the project leadership and direction, plus the main link with Ufi Ltd. It has also been significantly involved with other ADAPT Round 3 basic skills projects, and has played a key role in the basic skills 'cluster'.

Cambridge Training and Development Ltd is an established developer of adult basic skills multimedia software, with an established history of work with BSA. Their main role was the development of the assessment and training materials. Their

expertise has been enhanced by the incorporation of a further partner (NFER Nelson) with specialist knowledge of diagnostic assessment procedures.

Telford College is an existing provider of basic skills training to local companies (including SMEs) and their employees, winning the 1997 BSA Beacon Award for excellence in basic skills provision. They are part of the existing broadband distributed learning network called Broadnet. The College provided the training of staff in the use of the software, and piloted the delivery of training to local SMEs.

Other partners have roles which embellish this basic sequence, adding specific components in some cases, *eg* NFER Nelson, testing out different modes of delivery, *etc*. in others. Thus in this second role, **SOLOTEC** and the **Birmingham Core Skills Partnership** provided active links to SMEs in their area, as well as facilitating links between local providers and employers. Both organisations already had programmes of work in this field and integrated their work in the project into their current and future basic skills strategies.

Channel 4 has been assessing the potential role of digital TV and providing access to existing programme resources with basic skills relevance, which may be integrated into Skillsbuild.

The TUC has facilitated the involvement of unions in the development of Skills Build. The TUC role was to provide trade union members as volunteer tutors, mentors and learning facilitators. This role was intended to provide synergy with the TUC's own ADAPT Ufi proposal.

Project management

Overall project management was the responsibility of the project leader at BSA, although each of the separate phases and elements of the project had their own responsibilities and timetables.

Monthly Steering Group meetings were held, drawing together the main partners, and the results were published on a project intranet, to which all had access. There was also a discussion zone on this intranet, to encourage exchange of ideas and experiences, but this was not much used. There were formal quarterly reports on progress, with detailed consideration of achievements against timetable, plan and budget. Additionally, an external website was devised, and attached to the existing BSA website.

BSA recruited a specialist European Officer, played a significant role in managing this project, and linking it with other European and basic skill initiatives, most particularly a DGV project. The main effect has been to strengthen BSA's managerial team in the development of the project. This became more significant towards

the end of the project, when the project leader left BSA and the project.

Project activities

The main achievements of the project may best be assessed against the schedule of planned activities shown above.

Audit of expert practice within the EU

The audit of expert practice in the EU was been completed in late 1998, without it would seem providing significant new insight or identifying new ground-breaking approaches. More useful were searches of good practice in the US, where it is generally held that more attention has been focused on adult retraining in basic skills than in Europe.

Nevertheless, the project partners based in the United Kingdom have developed an extensive network of contact with other European organisations, as follows:

- Groupe Pennanente pour la Lutte Contre L'Illetrisme — Ministere de lemploi et de la solidarite (GPLI), Franc

- Alphalink 2000, partners in Ireland, France, Corsica, Netherlands and UK

- ODL Basic Skills Project, partners in Portugal, Finland, Austria and UK; National Literacy Agency, Ireland

- LandeliJk Studie-en ontwikkelingscentrum volwasseneneducatie (SVE), Netherlands.

These groups were then consulted regarding the Skillsbuild project plan. During the duration of the project these partners have been informed and updated on project progress and development.

Another network for transnationality and dissemination is the incorporation of Skillsbuild into other European strategies - such as Leonardo and Socrates. Partnership representatives have attended the Socrates ODL Basic Skills Project in Vienna with other groups such as Volkshochschule Florisdorf (Austria) and INETI (Portugal) and Karkku. College (Finland) to elicit more information relating to multimedia development in basic skills learning. The meeting promoted the exchange of information and ideas in relation to our different projects, which covered: the development of multimedia CD ROMS; distribution of guidelines for tutors working with multimedia; and research into pedagogy as a part of ICT development.

Developing of a computer-based entry assessment and guidance programme

This part of the software has proved very popular with tutors, and indeed some saw it as the main component of Skillsbuild. Initially the programme provided just a one-off initial assessment, but this has been developed so that it is possible to halt and resume the procedure later. This facet of the programme is regarded as an important feature in identifying the direction which users ought most usefully to follow through the subsequent training material.

The project's internal evaluation (see below) indicated that for many tutors the length of the assessment was too great; around 15 per cent of trainees had spent more than one hour working on their initial assessments. Tutors felt that the programme might more quickly assess the *general* level of the user, and move them more quickly on to material appropriate for that level. Users commented that they appreciated 'knowing where they stood' through using the assessment module. There was some suggestion that the assessment materials were too de-contextualised, but the addition of in-context features to Skillsbuild has been cumulative as the project has developed in different sectoral or occupational contexts, and this is expected to continue. Finally, in practice, the module is predicated on the assumption that tutors will work through the material with trainees, but this does not seem to have always been the case.

In essence, this aspect of the project seems to have been relatively successful, and this may be at least partly the result of the decision to engage a specialist partner (NFER Nelson) to provide expertise in assessment.

The ICT-based package of basic skills training materials

The main aim of the project was of course to develop and trial the use of novel forms of courseware to deliver basic skills training using a combination of CD-ROMs and the Web. The design, prototyping and subsequent refinement of the courseware was an early and important priority, and this too seems to have turned greatly on the involvement of appropriate partners, in this case CATD. It seems to have been very successful, in that the materials were made available on time and in a well developed form.

Integration and contextualisation of a mass of teaching materials have been problems through the early part of the project, but the progress of the project has seen successive refinement of the package, such that the internal evaluation restricts itself to fairly peripheral suggestions about possible further refinement.

The proof of course lies in the pudding, and we will discuss effectiveness of the courseware below under beneficiaries.

Providing training for 300 trainers in the use of these materials

There was a mixed experience with this aspect of the project. Where trainers were successfully engaged, they found the training sessions very helpful, and responded positively to them, and to the courseware. However, both the number of trainers engaged and the extent of their engagement seem to have been less than anticipated. Many tutors expressed the need for further time for practice and familiarisation, but this was not built in to the project, and as a result their use of the materials may have been less comprehensive than was possible. For example, both trainers and trainees alike said that they found it difficult to envisage the package as a whole, and so to use it selectively to meet specific needs.

There were some technical difficulties with the IT equipment available to the training sessions. Further, some concern was expressed by project staff that the existence of, and access to, a sufficiently modern network of IT equipment, and technical support staff, may often be less widespread than they had envisaged in designing the software.

Not all the trainers subsequently went on to use the courseware with their clients; the evaluation report cites 5 out of 12 trainers interviewed, who had not. Technical and computer-access problems seemed to be the most prominent reason given, although some did not find the materials to be always appropriate for the different client groups with whom they were working. Those who used the materials relatively little reported that they found it difficult to master the programme, and could not get the best out of it without significant inputs of time and effort. Thus it might be that there is a threshold of trainer competence, which the project has underestimated, both in the attention given to initial training and the complexity of the courseware.

Piloting the delivery of the training in 200 SMEs, involving 600 employees

The project fared less well in trialing the courseware with employers and beneficiaries.

Firstly the scale of the trial was somewhat smaller than envisaged; by October 2000, the project had dealt with 452 learners in all, rather than the 600 envisaged. The main reason for this seems to have been the difficulty of engaging SME interest in, and commitment to, the trial, although the envisaged recruitment of union members through the link to the TUC does not seem to have operated effectively either. The lack of organisational resource and experience at Telford College in marketing the programme to employers, and in drawing learners into the

programme subsequently, is identified as the main shortcoming here.

Secondly, the *extent* of individual participant's engagement with the programme seems to have been very shallow. The evaluation report shows that the top (*ie* most frequent) 50 users had only logged on 2-3 times, indicating that the remaining 400 had logged on less frequently than this. Of course, since some of the project work is CD-ROM based it is possible to use it without logging on, but this would mean missing out on some of the key features of the programme. The project database has no records of such non-web usage.

Thirdly, only a minority (40 per cent) of these users conform to the ADAPT criteria for beneficiary status, *ie* that they are unemployed or threatened with redundancy. This is hardly a matter of concern for Ufi, which generally has much wider audience scope, but it is a matter of some consequence for the finances of the project. If it is unlikely to be funded for nearly two in three of its beneficiaries, then it is not difficult to see why it may not have made its most pressing efforts to recruit more of them. It should be said that the project report that a reasonably liberal interpretation of the ADAPT beneficiary guidelines was offered to them through ECOTEC, but nevertheless, it does not expect to be funded through the project for the majority of its actual trainees.

Fourthly, this problem of potential under-payment has been accentuated by lack of experienced management and administrative expertise in record-keeping on the trainees. The result is that it may not be possible to 'count' even some of those who were eligibles because of shortcomings in their records.

Fifth, the courseware does not seem to have been equally successful with all levels of trainee. In essence, it seems that the users have been concentrated among those with moderate levels of attainment in basic skills. Thus, those with the worst problems have not been using the provision much, and nor have those with the best levels of attainment on assessment. It is not known how far this represents a 'recruitment' problem (*ie* that those with the poorest basic skills have simply not been attracted to the project), a 'pedagogic' problem (*ie* that something about the approach has not appealed to them), or a 'technical' problem (*ie* that the worst cases have also not been able to use the ICT on which delivery is based).

Evaluation and assessment

The project's internal evaluation was conducted by the Institute of Education. Staff from the Institute sat in on all the monthly management meetings, have had access to all the monitoring data and documentation, and have conducted a series of interviews with project staff, trainers and trainees.

Their report is mainly concerned with the pedagogic aspects of the project, and less with the practical and procedural side of the work. While it has some criticisms of these pedagogic aspects, these are not fundamental, and seem to be more focused on fine-tuning.

For example, it concludes that most of the trainees found both the use of ICT in general, and this courseware in particular, to be relatively straightforward. Indeed, for some the opportunity 'to work with computers' was once of the more important attractions of their engagement with the project. A minority, who generally had little or no previous exposure to computers, found their use difficult initially, and the great majority of users adopted to it quickly. Trainers too found the programme relatively easy to use.

While the evaluation has some criticisms of the underlying instructional design, concluding for example that the material would benefit from a greater mix of instructional approaches, it is nevertheless fairly positive about the suitability of the project's approach to the client group.

Issues which are emphasised in the evaluation include:

● the generally positive view of 90 per cent of users and trainers about the Skillsbuild materials

● the fact that many of the students reported that the ICT approach helped them to learn, and actively encouraged them to engage with learning

● the need for relatively close tutor support throughout the programme, but particularly at the beginning and during assessment

● Skillsbuild seems to have been successful in engaging with people who were relatively new to basic skills training, and who had not had this kind of help before

● lack of appropriate context and difficulty of customisation were seen as important limiting factors in containing the wider spread of this approach

● mainstreaming is more likely to be held back by technical factors associated with poor/little/no access to ICT equipment/skills than by any shortcomings in the material itself.

Ufi influence and involvement

Addressing deficiencies in basic skills in the workforce is one of Ufi's principal objectives, and this priority has been enhanced by the publication of the Moser Report bringing strong political commitment to the need to improve basic skills among adults already in the workforce. Further, all of the partners express

positive support for the idea of an enhanced, systematic and ICT-based programme to deliver such improvements.

Thus, on both sides of the equation, there seems to have been a reasonable degree of mutual interest and compatibility. There is evidence of constructive working between Ufi Ltd and BSA in particular, with BSA playing a big part in the design of the basic skills sector model, with a major BSA conference on 'Basic Skills and Ufi', *etc.*

One persistent underlying difficulty has been the eligibility of beneficiaries criteria; revisiting the old issue of Ufi broad targets *cf* the ADAPT narrow ones. In the early developmental stages of this project, this had not proved too much of a difficulty in practice. Nor is it the case that the lower-than-anticipated number of trainees can be wholly attributed to the likelihood that few of them would qualify for beneficiary status and financial support. Nevertheless, it seems certainly to be the case that this aspect of the project sub-structure has significantly undermined the emphasis on field-trialing within the project. BSA has throughout believed that the project would benefit from reasonable flexibility on issues of gender, duration of unemployment, occupation, *etc.*, provided the project retains it broad focus on disadvantaged workers in SMEs. However, now at final claims stage, and with only 40 per cent of the trainees qualifying as 'beneficiaries', this bullet remains to be bitten.

Although there have been a number of basic skills projects supported by this ADAPT Round 3, there were no obvious sign of competition or hostility between them. This was no doubt enhanced by BSA's central and established position in the basic skills field. Consequently, the overall climate has been one of joint working with Ufi Ltd towards shared goals, and there has been a good degree of confidence among this project's partners, that their work would contribute to Ufi's Ltd eventual adoption of a basic skills model.

Mainstreaming potential

The courseware has been designed to allow appropriate versioning for different industries and occupational areas while retaining a strong generic core. Further, in addition to the college-based delivery envisaged in Telford, there has been broader experimentation with delivery through learning centres, libraries, *etc.* in Birmingham, as well as the digital TV possibilities being explored by C4. To this end, it is hoped that the core software will be readily transferable to any sector of industry, and will be accessible through a variety of media.

The main purpose of mainstreaming within the Skillsbuild project was to provide Ufi with a system that could be used to delivery

one of their key priorities, which has always been to address the national basic skills problem using ICT.

Ufi has used the Skillsbuild structure and framework in two pilot schemes it is running in prisons and in the Care Sector (those who work in residential homes for old people etc). Although they have not adopted the system for all their provision, it is providing an interesting alternative to some of the other approaches they are using. The project remains hopeful that it will become one of the items in their resources for basic skills work.

For the Prison Service, Skillsbuild focused on the basic skills required for learning catering, and branded *CyberCook.* It used video, animations and HTML and is still undergoing testing in 6 prisons within the UK.

The approach was to make the whole product much more graphically rich and include a more modular structure, rather than using the '*learning object*' approach 100 per cent. This was because the area of catering needed to be structured to fit with both the basic skills standards and those required for the NVQ. The hospitality Awarding Body (HAB) provided us with guidance on this aspect.

The Care Sector project is running in the Yorkshire region, in partnership with UNISON and the WEA. The system is being used in conjunction with training being provided by the WEA tutors. At the time of writing the project is still in an early stage, but the recruitment has been very successful (so far about 400 learners have signed up)

The outcome of the pilots will determine the future use of Skillsbuild technology in Ufi products.

Main learning points

The process of establishing and initiating the project appears to have gone smoothly and more-or-less to timetable, with a well-integrated and expert partnership working constructively together. Externally, the links with Ufi Ltd itself and other appropriate projects in the basic skills area, appear to be similarly constructive and trusting.

Nevertheless, the project has placed greater emphasis on, and enjoyed considerably more success with, the developmental aspects of the project (*ie* in designing and developing the courseware) than the trialing component. The result is that the courseware remains inadequately tested. Further, the contextualisation and customisation for different settings, audiences, users *etc.* remains underdeveloped, since this comes largely through experience in the field.

Positive aspects of the project have been that:

- partners were chosen appropriately for roles (CTAT is a leading developer of educational software, BSA is the key player in basic skills provision, NFER-Nelson has a long track record in assessment tools, *etc.*). This has produced courseware which on the basis of the internal evaluation seems broadly suited to purpose

- sense of pragmatism about how to go ahead; the project has not blindly stuck rigidly to plan (*eg* new partner). This was facilitated by knowledge that Ufi was also strongly committed to basic skill training through ICT, and the view that even if they were not ADAPT funded to do this work, they would be doing something similar anyway

- sensible management and co-ordination arrangements; both within project (monthly mgt meetings; regular progress reports, *etc.*) and without it (helpful relationship with ECOTEC; friendly links with Ufi)

- synergy from other related projects (because BSA is big fish in basic skills, it has been able to draw on other of its projects for materials, for beneficiary openings, *etc.).*

The least positive feature of this project is:

- the lack of emphasis on the trialing component has limited confidence outside the project about the suitability of the courseware. It is difficult to know where to place the main reasons for this under-emphasis, but contributing factors have been:

  - the choice of a main field trial partner without sufficient experience/resource to undertake the trialing satisfactorily

  - the lack of trainees secure through the auspices of the related TUC project

  - the choice of Telford as the main trialing site, with very high levels of employment, and consequently fewer obviously ADAPT-eligible beneficiaries

  - the sequential nature of the project may have led to squeezed timetables and budgets in the latter part of the project, particularly as delay in getting polished version of courseware were evident.

TUC Learning Services

The project

The aim of the project was to develop trade union capacity to play a role in the development of the Ufi concept and wider workplace learning. The ultimate target group for the project was non-learners in the workplace, with the aim of increasing their participation in learning and skill development. The project was founded on the premise that unions have a unique role to play in supporting and encouraging non-learner participation. The main focus of the project was intermediate groups, *ie* union representatives, as a means of accessing non-learners. It appears to have been successful contributing to the development of an infrastructure within the union movement to facilitate access to learning, particularly among people without a tradition of participation. The project has also been successful in promoting the opportunities made available by the development of Ufi and other government initiatives, such as Individual Learning Accounts.

Project origins

The project grew out of the TUC Learning Services Task Group, whose remit was to make proposals for strengthening union involvement in lifelong learning and skills training. Its report, *Union Gateways to Learning*, was endorsed by Congress in 1998 and forms the basis of TUC policy on learning services. The Task Group mapped out existing union involvement in workplace learning. It was generally felt to be patchy, with some strong practice based on established initiatives such as the joint TUC/TEC Bargaining for Skills programme, the DfES sponsored Union Learning Fund and also individual union activity such as Unison's Return to Learn. The Learning Services project clearly builds on developments taking place under these initiatives. The Report set out a programme of work to widen the role of unions in the development of lifelong learning. One of the identified tasks was to develop a strategy to maximise the union role in Ufi.

As the Group was meeting, the ADAPT Round 3 Call was published. The TUC had not previously been involved in EU-funded initiatives in any major way and the implications of such an application had to be considered. However the Call was seen

as a serendipitous opportunity to pull together a number of emerging ideas into a coherent whole and therefore a bid was developed. The bid was written by a TUC official, with support from an external expert.

Partners

The project is based around a series of partnerships. A range of national bodies sit on the project Steering Group. In addition, each of the work packages has a number of key partners. For example, the learning representatives project was developed in conjunction with the Employment NTO (who have a role in developing the standards), the National Open College Network and a range of unions (UNISON, AEEU, GPMU, BECTU, and UNIFI). The ILA project is supported by the DfES and North West and London TECs (through the Bargaining for Skills initiative) and involves UNISON, GMB, AEEU, USDAW, and UNIFI. The Basic Skills Agency is a key partner in the basic skills work package as were Cambridge Training and Development (CTAD), who were responsible for developing the assessment and training materials. At an operational level the project also depended on a series of partnerships developed between individual unions, employers and training providers.

Project management

The project director was the TUC's National Officer for Learning Services and the project had a clear fit with her overall remit. There was an overall Project Steering Group which included representatives from organisations such as the TEC National Council, the Campaign for Learning, and IIP(UK), as well as the key partners and the TUC itself. It met twice in 1999 and three times in 2000. Each meeting was presented with a detailed report on all aspects of the project.

Each of the work packages had its own work team, co-ordinated by a convenor, responsible for delivering their workplan.

Evaluation

York Consulting was appointed as the project evaluator with a slightly wider remit that the ADAPT project. It focussed on four main strands of project activity and the wider impact on the union movement. The evaluation had five main aims:

- to identify the extent to which the project supported the development of a network of learning representatives

- to assess the impact of the project on the way unions have developed their structures and procedures to provide learning services

- to assess how the project has encouraged individual unions to develop Individual Learning Accounts (ILA) projects

- to assess how the project has helped unions prepare for and participate in the Ufi

- to identify the impact of the development of materials and resources to deliver learning services particularly in relation to employee development schemes (EDS) and basic skills.

Three evaluation reports have so far been produced:

- a report on the learning representatives aspect of the project — based on a survey of learning representatives (June 2000)

- a report on the individual learning accounts aspect of the project — based on a series of case studies (June 2000)

- a summary report covering all four elements of the evaluation (December 2000).

At the time of writing, two further reports are due shortly.

Project activities

The project involved a series of linked 'work packages'. Three of the main packages involved:

- the development of the union *learning representative* role — the aim being to support the establishment of workplace learning representatives, through setting standards for the role, establishing an 'award' (rather than a qualification), providing information, training and other forms of support *etc.*

- developing and piloting union learning membership schemes linked to *Individual Learning Accounts*, through a series of demonstration projects, building on established Bargaining for Skills projects in London, the North West and the South West

- enhance the provision of *basic skills training* by providing assistance to union representatives to help them support members with basic skill needs, including the development of union-oriented training materials. A key element of this work package was the development of 'unionised versions' of basic skills material. Separately (not part of this project) the TUC is working with the Basic Skills Agency to develop a basic skills package for community tutors (see Skillsbuild case study).

Other aspects of the project covered:

- testing ways in which union learning representatives could extend their learning services and expertise to employees of SMEs

- developing the TUC's capacity to deliver distance learning material on-line

- developing a union quality kitemark for training materials
- providing a channel of information for unions regarding Ufi
- communications and research support.

Below we report on the main strands covered by the project evaluation and briefly review the progress of the other substantial elements of the project.

Learning representatives

Over 2,500 workplace learning representatives have been trained since 1998. The ADAPT/Ufi project funded the development of a national training standard through a consultative exercise involving a wide range of unions, the TUC, learning representatives, training providers and the Employment NTO. The York survey of learning representatives found that learning representatives were active in promoting the benefits of learning, particularly to people with very little previous learning experience, through the provision of advice and guidance, information about learning opportunities and encouragement. In terms of wider impact, three quarters of the respondents to the York survey felt that their work had had a positive impact of their workplace.

The role of the learning representative has become well established in many unions. The ADAPT/Ufi project appears to have contributed to developing a clearer role for learning representatives, through the establishment of standards, and supporting the more widespread adoption of the role, which is likely to be sustained through two reinforcing factors:

- new legislation that grants a statutory right to time of for learning representatives (the lack of time was identified by the York survey as a key barrier, preventing learning representatives from effectively carrying out their role)
- DfES funding at national and regional level for union contributions to workforce development.

Individual learning accounts

A range of projects were established to explore models for using individual learning accounts (ILAs), mainly targeted at non-traditional learners. Unions worked with employers to integrate ILA support, made available through TECs, with specific programmes aimed at meeting the needs of employees facing redundancy, industrial change or fundamental skill needs.

The York evaluation found that the involvement of unions provided added value in terms of:

- reaching non-learners and generating interest 'on the ground'

- supporting the application process and filtering enquiries

- negotiating partnerships with employers and providers

- co-ordinating briefings and support from other agencies

- developing courses for individuals to access via ILAs.

The evaluation found evidence that the projects had led to a significantly greater up-take of ILAs in some areas. The projects also highlighted the difficulties some account holders had with the bureaucracy associated with the ILA concept (in its pilot phase) and the role agencies such as unions could play in overcoming such hurdles. However there was concern among some of the TECs involved over whether some of the models developed by unions fully embraced the principles of an individual entitlement envisaged by the ILA framework. This was especially felt to be the case where models were focused around a specific course or met needs identified by an employer or a union rather than an employee.

Basic skills

Under this element of the project, ADAPT/Ufi funding was use to extend existing Union Learning Fund money to fund 30 workplace basic skills projects in conjunction with employers and training providers. In addition a wide range of support materials were developed for learning representatives and providers. The ADAPT/Ufi funding was instrumental enabling an on-line basic skills tutorial package to be developed and widely distributed. It largely consists of a customised version of CTAD's (a key project partner) reading and numbers CD-ROM. The York evaluation concludes that the basic skills CD-ROMs have been well received by unions as an effective tool that will engage members because of the good use of examples that are relevant to member's home and working lives. However there is no clear evidence as to the effectiveness of the CD-ROM in enabling learners to attain a higher level of basic skills.

The critical success factors behind the success of this element of the overall project are considered to be:

- the trust established between union learning representatives and employees which allows employees in need of basic skills support to 'engage' with representatives when they are fearful of put off doing so with others

- the link between union representatives and employers through which representatives can bridge any gap between a training provider's focus on 'learning' and an employer's interest in the needs of their business

- the ability of unions to understand the needs of the individual employee and their environment and to help providers tailor the content and delivery of learning programmes accordingly.

Other aspects of the project

Involvement of unions in learning development in SMEs

The project found it difficult to identify the best way of moving this aspect of the project forward as unions have such a relatively low level presence among small employers. Although there were discussions with the ADAPT Support Unit in the Autumn of 1999 to find ways of effectively addressing the SME element this was one of the less successful elements of the project.

The project was able to work with a range of smaller unions, *eg* GPMU in the printing and creative industries and through them smaller employers, to develop access to training through ILAs. It was also able to develop the role of learning representatives, based in larger organisations to influence access to learning in smaller employers in the supply chain.

Ufi influence and development

The development of the project was very much influenced by the Ufi initiative and the TUC's interest in it. The project was able to both raise the demand for learning (*eg* through the learning representatives and ILA initiatives) as well as improve the provision of learning opportunities (*eg* in the area of basic skills). In addition to these specific contributions to the Ufi agenda the project was also able to:

- increase interest in learning agenda among unions, partly by provided a focus for union activity in this area

- raised the profile of the Ufi concept among unions and vice versa, *eg* by encouraging applicants for the new Learning Centre Hubs to seek union involvement in their bids

- enabled greater inter-union networking on learning — partly through the Ufi Ltd 'cluster group'.

Involvement in the cluster group

As part of the ADAPT/Ufi project, eight unions were involved in a structured dialogue with Ufi Limited through the union cluster group which was designed to enable unions influence the development of Ufi/**learndirect** and help ensure that unions were aware of and involved in Ufi developments.

The York evaluation found that:

- individual unions and Ufi Limited both found the cluster an effective means of communication, although York found that unions less well linked into the group were less clear about

developments and the possible connections between Ufi/**learndirect** services and other union learning services

● most of the unions involved in the cluster group had been directly involved in partnerships bidding to be Ufi local or sector hubs — although there were opportunities for other unions to become more involved at local and regional level.

Both through involvement in the union cluster group and others covering learner support and basic skills, and through liaison at national level, the project appears to have had close links with Ufi Limited. The project also established a working relationship with other projects notably the Basic Skills Agency's ADAPT project (Skillsbuild) on which the TUC is represented and the Marchmont project.

One of the concerns that the TUC has about the development of Ufi/**learndirect**, and one they have expressed through the various communications channels, is over learner support and whether Ufi has paid as much attention to putting in place people and mechanisms to help people access and use learning materials as it has to developing those materials themselves.

Mainstreaming potential

The TUC's Learning Services project has been able to show potential to influence the long-term development of learning policy at three levels.

● at one level, the project has demonstrated the potential of workplace learning representatives to generate demand among people not generally engaged in learning activities and support their involvement. The value of learning representatives can be demonstrated by the change in the legislation to grant them time off for learning activities. The project has also contributed to the development of basic skills learning materials using ICT

● secondly, the project has demonstrated the value of linking policy developments, for instance by integrating Ufi/**learndirect** with ILAs and also other initiatives such as Bargaining for Skills and the Union Learning Fund

● finally, at a wider level, involvement in the project has been felt by the TUC to be critical in developing the capacity of the union movement to respond positively to the developing the learning agenda. By funding support services at TUC level the project has enabled unions to see the advantages of working with DfES policy initiatives and engaging with employers on learning and training issues.

Main learning points

This appears to be a successful project in its own terms, and one which has also contributed on a wider level too, not least by integrating a range of policy initiatives. It has enabled the main participants, *ie* unions, to contribute to both the development of the Ufi policy and the wider learning policy agenda. In this way the project ran with the tide of the growing interest among unions in learning issues and an enthusiasm for union involvement in government circles.

At the same time it is difficult to isolate the unique impact of the ADAPT/Ufi funding as it has contributed in a largely incremental way. This has contributed to the difficulties in terms of accounting for ADAPT beneficiaries (in order to claim funding) and measuring additionality.

A second difficulty from an ADAPT perspective has been the lack of involvement of small employers, although this was an inevitable problem given the structure of union membership in the UK and the lack of penetration in the small business sector.

Wales Digital College — Development of a Resource Locator

The project

The objective of the project was to develop a 'resource locator' that would bring together a library of digitalised archive material that would be available as a learning resource through the Internet. The end product could best be described as a 'digital warehouse', where programme material (as, for example, produced by a television company) would be broken down into small parts (known as 'rushes'), stored digitally and thus be available to users in this fragmented fashion, according to need. It would be possible, therefore, to take a small scene from a particular video production, where this was relevant to a particular learner, rather than having to plough through the whole programme.

The project was seen as an integral part of the *Wales Digital College* (WDC) initiative. The WDC was first launched in 1997 and funded from a range of public sources including the FE and HE funding bodies in Wales. The initiative aims to use the emerging ICT to increase the take-up of education and training in Wales by providing information on relevant learning opportunities, linking counselling and advice on careers, *etc.*, with these opportunities and generally acting as a catalyst and conduit for education and training development. The WDC is committed to working in Welsh and English and this requirement also applied to the Resource Locator project.

The resource locator project focused on three interrelated activities as follows:

- the identification of suitable material that could be digitised and archived ready for use

- to develop the necessary standards in operating the resource locator, particularly the issue of an 'Multi-Media Performing Rights' (MMPR) management system

- the piloting of the resource locator in a learning environment and involving user groups from learning providers and SMEs, as the consumers of learning.

All aspects of the project proved to be challenging for the partners, but by the conclusion at the end of December 2000, everything was more or less in place and completed, albeit following a sprint in the final few months of the project.

Origins of the project

The need for a resource locator has its origins firmly in the wider objectives of the WDC. It is part of the approach to the national Life-long Learning initiative in Wales and fits in with the findings from various information sources that indicated the problems of the low skilled Welsh economy and the need to reach more potential learners both in the workplace and the communities, many of which are isolated geographically and economically. Pilot work had taken place through the WDC with support from the two principal television companies in Wales (BBC Wales and S4C).

There had also been relevant development work on the standards and licensing issues to do with the use of such archive material, at the Research Centre Wales at the University of Bangor (one of the principal partners in the ADAPT Round 3). In fact, it was this centre that first identified the project potential from the call for bids and so got in touch with the main partners. The University has extensive experience in European funding (*eg* ESF, DGXIII, Leonardo, *etc.*) and this resource was drawn on to formulate the bid, in association with the embryonic WDC.

Progress to date

The project was effectively launched with a press release in January 1999 following the first full steering group meeting, though the project was not officially confirmed until the Summer of 1999 and contracts were not signed by the partners until as late as June 2000. This contractual delay caused some problems for the main partners, though because of a commitment from the lead organisations (in particular the ACEN Trust and the University of Bangor) to underwrite the project until funds were released, the effect on the work plan was much less than it could have been.

Nevertheless, the delays meant that much of the activity was telescoped into a shorter period, basically the 18 months from the middle of 1999 and the problems this caused were particularly evident in the last six months or so of the project, when the resource locator was being completed so that it could be used in the various dissemination events planned. This revised timetable was agreed with the ADAPT Support Unit in late 1999 and did not require substantial revision again.

However, the project did experience a number of setbacks that were beyond its control. The most serious of these was the loss of

a private sector partner, Lucas Automotive, following the closure of the South Wales plant during 1999. However, the project managed to secure a replacement private sector partner, NTL, which brought extremely relevant experience to the project in the form of digital technology to deliver learning to real people via its established cable network to homes in South Wales.

Another of the partners, destined to be closely involved with the trials of the resource locator, also experienced some potentially damaging changes. Chartered Trust underwent some corporate changes, including the movement of some senior staff who had shown the initial commitment to the project. However, despite this, their involvement continued to a satisfactory level.

Useful transnational activities have also taken place, which started with a meeting in Finland in the summer of 1999 with counterparts from Finland and Austria. The project was particularly keen to explore the Finnish experience with their 'virtual university'. Subsequent links were established with partners in Spain (Catalonia) and Ireland, particularly to share experience with handling minority languages. Links were also explored with Italian partners, particularly on the subject of special needs access.

At the conclusion of the project, the main outcomes can be summarised as follows:

- a working Resource Locator
- standards on an electronic rights management system
- archive of digitalised video material
- training materials
- training completed for staff in FE institutions
- training completed for staff in SMEs.

These are the tangible, measurable outputs, but it is also evident that there have been (and continue to be) other valuable spin-offs from the project that were not foreseen, not least being the working relationships established between the key partners.

A key strength of the project has been the effort put into dissemination. This has involved no fewer than ten training events (involving over 180 participants), three roadshows and 14 conference inputs (including some international events). In addition, an initial leaflet publicising the project was produced in June 2000 with a print run of 60,000 available in Welsh and English.

Ufi influence and involvement

There is a strong recognition among the key partners of the objectives of the Ufi concept and its potential in Wales (which is generally considered strong). The WDC is complementary to the Ufi concept and will help meet its objectives in a direct way. However, there is also the potential for overlap in both organisation's objectives and the original prospectus for the WDC (issued in 1997) went to some length to explain what it saw as the differences between the two initiatives. Key differences highlighted include the potentially wider remit of the WDC, which will not only act as a broker of learning resources, but will also deliver content through various access points.

Another key difference between the two initiatives is the focus of the WDC on the demand and supply of learning in Wales and the need to address services in Welsh and English. However, the specific focus of the ADAPT Round 3 project, the resource locator, will clearly have applicability to both the WDC and Ufi concept and is closely allied to the objectives of both initiatives.

Nevertheless, this ADAPT project has developed independently of Ufi/**learndirect**. In the early days of the project, a memorandum of agreement was reached following high level discussions between the WDC and Ufi Ltd and this provides for each initiative to continue with their own activities while keeping in regular communication. Regular contact has continued and the Ufi are naturally interested in the resource locator and see it as a potentially valuable tool for the delivery of multimedia material.

The project partners have also been involved, through the ADAPT Support Unit, with attending various dissemination events in England and this has generated considerable interest in the potential of the resource locator to the extent that its wider take-up seems assured.

Partners

There were nine original partners in the project, seven of who were involved at the bidding stage and most of who were still on-board at the conclusion of the work. The one main change was the loss of Lucas Automotive (following closure its plant in South Wales) and the addition of NTL PLC as a private sector partner. The situation at the end of the project was as follows:

- Wales Digital College (the lead partner)
- University of Wales, Bangor, Research Centre Wales
- S4C (television company)
- Welsh Development Agency
- CELTEC (the TEC for North Wales)

- CLIP (private SME specialising in digital archiving)
- NTL
- Chartered Trust
- Apple Computer.

Within the nine, four of the partners were more closely involved with the developmental work on the resource locator and its associated tasks. The WDC as the lead organisation has responsibility for management of the project overall, the University of Bangor has the biggest role in leading the development of the resource locator and research on standards and licensing of material, S4C is the main media organisation with the material to archive and CLIP is the SME set up specifically in response to the needs of S4C in terms of its archiving.

Three large private sector companies involved, NTL, Chartered Trust and Apple, were significant contributors of matched funding (measured in staff time and equipment discounts, *etc.*). Lucas were originally involved as a test bed for the material aimed at the needs of the automotive sector, but this role was covered by Chartered Trust and the SMEs in the sector. Apple Computer, in addition to the other partners with responsibility for developing the 'products' (basically the WDC, Bangor University, S4C and CLIP) received direct funding from the project.

Project management

Throughout the project was managed by the Welsh Digital College as part of its wider administrative operation. The project manager and other members of the WDC team working on the project were principally employed under the WDC and worked on the ADAPT Round 3 project part-time.

Representatives from all the partner organisations formed the project steering group which met every three months to review progress over the previous quarter and agree the actions for the next. Meetings were held in Bangor because this was deemed to be the most convenient location for the majority of the partners. Contact in between the formal meetings was maintained through electronic and the usual methods.

The project had a clear structure, articulated through the quarterly reporting periods. These are documented in some detail, including the setting out of the aims and objectives of the work in each forthcoming quarter to the conclusion of the project. The revised project milestones provided a detailed set of stages for the project proved to be a useful structure charting progress in 2000.

The main problems encountered with project management were caused by the delays in contracting and in releasing funds, attributed to the deficiencies in the ADAPT system. However, the

delays meant that too much work had to be concentrated into the last few months of the project and this inevitably created some tensions between some of the key partners and the contract holder.

A final evaluation of the project, commissioned by the partners, concentrated on gathering feedback on the training undertaken. This was carried out by one of the main partners (S4C) working with an independent consultant who did most of the fieldwork. The findings show a very favourable response from the FE/HE sector, but less so from the SMEs, where they proved more difficult to engage effectively.

Overview

The project moved into its implementation phase after a slower than hoped for start due largely to administrative delays. However, once underway it operated with a clear structure and with milestones set and reviewed at least quarterly, supported by an inclusive steering group. As an integral part of the Welsh Digital College initiative, it was at once of direct relevance to the aims of Ufi Ltd and the resource locator, as the major output from the work, provides a valuable tool for accessing multimedia learning material that should contribute to developments going on in this wider framework.

The critical factors that the project had to deal with (aside from the contractual delays) were mainly arose because of changes in some of the partner organisations. However, the project was fortunate in overcoming some of the changes and, in fact, gaining strength from the new partnerships and personalities involved. Also, the difficulties in engaging the interest and support of SMEs in developmental work of this sort became apparent and provided a challenging time for the project in its last stages.

The outcomes from the project have generated considerable interest beyond Wales and the prospects for further developmental work and the wider take-up of the resource locator and its associated activities looks strong.

The Learning Connection

The project

This was the largest project funded by ADAPT Round 3 covering Cornwall, Devon and Somerset. Essentially, the project was about piloting all the facets of a learning infrastructure in the region and overseeing the establishment of related-processes in the area. The project's original aim was to enhance employability and to meet the lifelong learning needs of new and existing learners, through the promotion and delivery of a coherent network of information, guidance, advice and training within the region, supported by a shared quality assurance system.

The project was based in a wide-ranging regional partnership, facilitated by Learning Alliance South West. Through a range of sub-projects the Learning Connection has:

- conducted research to identify current provision of information, advice and guidance and delivery mechanisms (including ICT); to identify gaps and problems with this provision; to analyse and assess quality assurance systems; and inform the development of the Ufi concept

- developed and implemented an integrated, coherent marketing and promotion strategy covering all aspects of the Learning Connection

- met customer needs by developing the Learning Connection to provide information, advice and guidance where, when and how required

- developed new learning materials and packages where gaps existed and a need was identified. These have ranged from basic skills and key skills training packages for individuals and trainers, to training in new media and IT

- ensured quality by piloting methods for accreditation and kitemarking local products and services and developing strategies to ensure that standards are maintained.

There were 54 individual projects within the Learning Connection involving 30 separate partners. Many projects were targeted towards rural and isolated areas, and focused on SMEs in a broad range of sectors such as the creative industries, veterinary services and transport. The projects were linked both in terms of the

common Ufi themes and through a dependence on ICT developments for delivery.

Origins of the project

An established partnership existed between Plymouth University, Exeter University and Devon and Cornwall TEC (PROSPER) prior to the third ADAPT Call for projects, which had worked together on previous ADAPT projects. When the Call was published, representatives from these organisations invited all relevant partners in the region to put in bids which were in line with ADAPT-Ufi principles. The submissions from partners subsequently formed the basis of the application for funding.

The existence of an established and respected core partnership and a history of collaborative working with other partners underpinned the early, visionary stages of the project.

Progress to date

At the onset, the TLC project faced significant delays in funding which had a severe knock-on effect for project activity, contracting with DfES and, staff and programme management. These delays hinged primarily on the legal status of the TLC holding company - Learning Alliance South West (LASW) and its suitability to receive ESF funding. LASW was set up specifically to manage and run the project yet remain independent from the sub-projects themselves. Monies were finally received by LASW during the latter part of 1999 at which point formal contracting with sub-projects began. Many of the sub-projects had been unable to start delivery until ESF funding came through although others had gone ahead and followed their original plans on receipt of the earlier unofficial approval. These were usually organisations with experience of ESF funding regimes and delays which were able to carry the risk.

The delays in funding resulted in some of the original sub-projects dropping out from the Learning Connection and others being brought in at a later stage to replace them. The profile of projects was ultimately significantly different to the planned profile with the least viable no longer taking part. Although the funding delays tested the commitment of some of the project's partners, the management team believes they had the strongest partners on board with a good mix of projects from the public, private and voluntary sectors. The new sub-projects have included organisations with no previous experience of running ESF-related projects. This has been positive as it allowed LASW to engage organisations that might not normally access such funding but bring significant skills and expertise to the programme delivery. These projects were given specific advice on MIS protocols

The focus of the TLC project has changed over time, partly as a result of delayed funding, but also because of the pace of national policy change. In particular, the project's initial emphasis on developing an ICT infrastructure in the region to increase access to information, guidance and learning was superseded by Ufi/**learndirect**. Rather than developing and thus duplicating the Ufi structures, the project instead shifted its efforts towards improving access to these services for SME's in ways which were complimentary to Ufi/**learndirect**, and in areas which were not covered by learning centres *etc.*

In addition to the changes concerning the use of ICT, and the development of a regional infrastructure, the TLC project had also originally planned to establish a coherent network of information, advice, guidance and mentoring services across the region. Indeed, this formed a mainstay of the original project. However, the DfES's Local Information, Advice and Guidance (LIAG) programme, which is being delivered locally by Cornwall and Devon Connexions and Somerset Connexions has already established such networks and support its ongoing development. As a result the TLC project shifted its focus to enhance the LIAG network, particularly in relation to services which target ADAPT/Ufi eligible beneficiaries. All of these significant changes were agreed by the ADAPT Support Unit.

Delivery of the sub-projects was necessarily staggered with many of the research-based projects completing very early on in the life of the project. Others which have been concerned with the design and provision of training packages *etc.* have come on board later in the life of the project. All TLC project activity was due to finish in June 2001.

The Learning Connection was not a beneficiary-driven project, per se, and had a target of only 1,900 beneficiaries in total (this was reduced from the 4,000 originally planned due to the previously mentioned, significant changes). Beneficiaries from TLC are most likely to have received information and guidance which may eventually lead to the take-up of substantial learning activities rather than completing formal qualifications or training programmes. The main outputs from the project concern developing and embedding networks, commissioning learning materials and widening participation, boosting the demand for learning and developing publicity materials rather than training people directly.

Transnational activity

Transnational activity has centred largely on disseminating information about TLC to organisations in other member states, although there are a few examples where transnational partners have been instructed in project delivery. The project management

team has found that awareness of Ufi as a policy concept is low in other member states and amongst MEP's.

Partners

There was a wide range of over 30 organisations involved in the TLC project. Key members of the Learning Connection partnership, responsible for one or more sub-projects included the local Career Services, Further Education Colleges, library services, Councils and other learning providers. Private sector providers included several media companies, radio and broadcasting organisations, marketing consultancies and SMEs themselves.

Project management

The project was run by the Learning Alliance South West which was established to act as the accountable body for the project. In essence, LASW performed a role similar to that of a support unit. It monitored and managed the bigger TLC project and contracted with individual sub-projects. More importantly, it brought the projects together thematically and managed the programme overall to ensure that collectively the component projects met the commitments made in the bid. LASW also co-ordinated and responded to the Adapt support units additional demands for information. and provided support services, and an independent evaluation of the TLC project as a whole was commissioned.

The project management team changed over time. The original project directors were instrumental in designing the project and maintaining the interest in, and commitment to it whilst funding was delayed. Following this inception phase, a new management team was introduced to implement the project, and manage and monitor the sub-projects.

A number of thematic task groups were set up by LASW to engage partners in strategic management issues relating to meeting the objectives of the bid. The groups also served to link sub-projects covering similar areas of work, to enhance communication and to encourage collaborative working between sub-projects and the central project team. These task groups have focused on:

- Research
- Marketing/promoting demand for learning
- Quality
- Staff development
- ICT
- Evaluation

- Transnational.

Some of the task groups were more successful than others and again, because of the funding delays, the commitment to the task groups waned in some cases. Another problem was the geographical scope of the TLC project; it proved difficult to arrange meetings where all relevant sub-projects could attend. Having said this, the task groups have been formative at key stages in the TLC life-span and there is a need for this sort of structure in a project of this size to ensure synergy and exchange of information and good practice.

Evaluation

LASW commissioned an independent evaluation of the project in its very early stages to be both formative and summative and evaluation activity has been impressive and proactive. As part of this, the project had a permanent (independent) evaluator working with and visiting sub-projects to monitor their progress. In so doing, she has linked smaller projects with one another where activities were complimentary or similar and lessons could be exchanged. The evaluation team has undertaken surveys on innovation at the sub-project level, and importantly, has explored with sub-projects the links they have with Ufi and the Ufi principles, making recommendations on how this can be improved over time. The evaluators have helped shape the TLC project as a whole and have provided support to sub-projects *eg* seminars have been held with sub-projects to help them with monitoring and evaluating their individual outputs and outcomes.

The evaluation team has been instrumental in reviewing and highlighting the links between TLC and policies at the national, regional and local level. This is a strategic move which will further embed the work of the TLC and its partners and identify new directions for future activity.

Impact on Ufi development

In the main, contact with Ufi has been minimal concerning TLC and sub-projects have not enjoyed an effective two-way relationship with Ufi. Some sub-projects have taken part in Ufi cluster activity but inputs and impact again appear minimal. There were plans to get sub-projects, their partners and Ufi together to facilitate better communication in the latter stages of the TLC project and to promote greater dissemination of project findings and learning for the future. As a result of the perception that UFI central were not engaging with Adapt/Ufi projects nationally, LASW drew on the information available in the establishment of the **learndirect** hub, locally.

The TLC project had envisaged that it would have had more influence on the shape of Ufi policy. However, in many ways it appears that Ufi has gone ahead with the development and implementation of national and regional policy without learning from projects on the ground. There has been no feedback from Ufi that messages have been received from TLC or that they have been taken on board which has hampered the credibility of Ufi in the region amongst TLC partners. Having said this, there remains great commitment to the Ufi concept which is appropriate for the region and for learning in the future. LASW feels that the learning from managing ADAPT-Ufi project, particularly at this scale, has not fed into the design of the EQUAL programme.

Sustainability

One of the most important outcomes from the TLC project has been the establishment of a significant and sustainable ongoing partnership in the South West region to promote and deliver lifelong learning. This is not a result of Ufi *per se* (although the Ufi principles guide much of their activities), but rather due to the fact that individual sub-projects in the region and the TLC have forged effective working relationships under the ADAPT/Ufi programme that will continue in the future. Learning Alliance South West would not have been established without The Learning Connection project, and LASW has itself gone on to become a **learndirect** hub. LASW seeks to maintain and further this partnership to promote lifelong learning activity in the region as a whole. The Learning Connection has strengthened the learning infrastructure and has drawn in new and multifarious partners and providers in the process.