

1. Introduction

This is the final report on the Pathfinder Project set up by the Learning City Network (LCN) and funded by the Department for Education and Employment (DFEE) to field test the Guide *Practice, Progress and Value*.

The Guide was commissioned by LCN and published in 1998. It involved work on the development of a system to evaluate the value added by learning community initiatives in developing a culture of learning, regeneration and improvement in the quality of life in their areas of operation. The Guide attempted to give attention not only to the quantitative outcomes of work undertaken but also the qualitative outcomes produced by the process of partnership.

The Pathfinder Project was set up to field test the Guide. It supported 18 learning community initiatives in the use of the Guide to develop their work. *Practice, Progress and Value* suggests that there are three strands to most learning community initiatives:

- i. developing and sustaining an effective partnership;
- ii. building dialogue with the community; and
- iii. developing a system for measuring added value.

The framework outlines a further three types (or levels) of evaluation which can be assessed for each function:

- i. getting organised;
- ii. developing shared understanding; and
- iii. reflecting.

The individual Pathfinder projects were very different but were grouped into three common themes:

- developing and sustaining partnerships;
- marketing learning and developing guidance; and
- information and communications technologies.

The report has been prepared using three main resources: reports by the projects themselves, input from consultants and the Pathfinder Joint Co-ordinators, and the report of the proceedings of a conference held for projects in July to share messages about the use of the Guide.

Those involved in learning community initiatives are particularly interested in how other places have conducted their work. To ensure that this is accessible there is a short report on each of the eighteen projects. Following this there is a section about how the Guide was used and its benefits and limitations. The last section deals with messages from projects that those seeking to develop learning community initiatives may find useful, and raises issues which emerge from the general experience of the Pathfinder projects.

2. Project reports

i) Developing and Sustaining Partnerships

St. Helens and Associated Boroughs

Objectives

To work across four Boroughs in the North West in identifying measurable standards of performance that might contribute to medium term strategic goals for a learning town. The part of the Guide on which the project was based was the Performance Strand, particularly those parts that deal with benchmarking and target setting.

The project had four elements:

- unstructured interviews with lifelong learning managers
- structured questionnaires to named individuals
- searching of the internet for relevant data
- the joint dissemination of findings and workshop discussion.

It involved examination of the current raft of measures being used to establish baselines and to set local targets. The hope was that there would be indications as to how performance indicators, and qualitative measures might be developed that would complement the national targets and looked towards benchmarking the quality of education and training provision.

The survey covered two main areas:

- satisfaction with the current National Targets; and
- the identification of other measures and benchmarks, which might provide data likely to be of use in the particular towns.

Outcomes

The survey showed general satisfaction with the national target but targets for adults were felt to be much less useful and appropriate than targets for young people. There were particular problems with the participation target which was felt to be about right by only a third of respondents although there was a fairly equal division between those who felt it to be too high and those who felt it was too low.

What the survey showed was a belief that measures outside the National Targets were needed and that those responsible for the development of lifelong learning needed to be able to measure their activities and their successes against those of other communities. Specific areas were suggested in respect of young people but the recommendations for adults were much less settled. Basic and key skills were mentioned but other specifics were not clearly identified in the project report. There was a view that local targets might better be expressed in numbers than percentages.

The Internet search reflected the difficulties that the authors of the Guide had experienced in searching for targets and baselines for learning. Examples of some interest were found from the USA and Australia but there is a paucity of data relating to England.

The final part of this project involved a day seminar, which included representation from Blackburn and Darwen Borough Council who were the partner authority in this grouping. Findings from both the consultants used were presented and there were workshops on the usefulness of the toolkit and on how learning community approaches can give national and local learning targets a higher profile.

These two projects found the Guide limited in its usefulness and felt that in its current form it did not provide sufficient guidance for a community to construct its own set of valid measuring mechanisms. There were a series of recommendations about how the Learning City Network might create a more useful document but in summary the project states in its final report: -

"There need to be examples of the types of data that provide a foundation for identifying and selecting targets. There is a need for guidance on data-gathering and re-measuring performance against the indicators. The application of benchmarking is not to be taken on without a clear set of objectives and the kit needs to provide practical assistance with identifying and selecting appropriate benchmarks."

Blackburn with Darwen

Objectives

Initially to develop commonalities between unitary authorities in the North West of England. However, as the project developed it concentrated on the piloting of the Guide through a partnership group in Blackburn and Darwen alone. This group was closely related in its membership to the Blackburn with Darwen Lifelong Learning Forum and is a sub-group of the East Lancashire Learning partnership.

Most of the partners involved with the project had worked together in the commissioning of an extensive baseline research report mapping participation in education post 16. This meant that the group had already worked together on a very substantial project and had shared and detailed information about participation and opportunities in their area.

Because of their long-standing history of working together the group concentrated their work on the Performance Strand of the Guide. The project was carried out through four meetings and attendance at a joint evaluation and planning day at St. Helens. Action took place in relation to internal assessment, external comparison and evaluation of added value and included the setting in train of a benchmarking exercise that will provide the basis for an extended role for the working group beyond the life of the Pathfinder project.

The role of the Consultant in this project was to guide partners through the use of the Guide, to plan work sessions and to facilitate and record outcomes including the final report. A first, and accurate, conclusion of this group having been that the Guide was not a structured work pack, but rather a stimulus to thought and action.

Outcomes

The first meeting of the project dealt with issues of group structure and confirmed that Strand 3 was the most appropriate area for the project to focus on. This was achieved through discussion of key issues derived from the Guide. The group then spent time assessing the themes contained within it and drawing up a schedule to guide progress. The second meeting focused on an assessment of the base line position of the partnership and also began the process of preparing for external benchmarking. It was felt that the pack was convincing on the need to benchmark but sketchy on how this should be done.

The benchmarking procedure carried out by Blackburn and Darwen was one that they would recommend to other partnerships. It involved using original census data to come up with the 5% postcode areas with most resemblance to the Blackburn with Darwen area. Three possible benchmarking areas were then selected because they matched and because partners had suitable contacts to begin an exercise.

The benchmarking exchange was to involve some quantitative data but the exchange of good and innovative practice was seen to be the primary aim. The development of tools and arrangements for the benchmarking, the issue of added value and overall evaluation of the Guide, formed the agenda for the fourth meeting. Benchmarking was to be carried out through use of benchmarking sheets, examples of which are included in the project's final report. These show what has been carried out in Blackburn and Darwen and invite identification of similar initiatives, their progress and other useful developments from the benchmarking partner. The group used relevant sections of the pack to carry out a test case study demonstrating value added using the development of Community Access Points in the Authority, an initiative in which all participants had been involved. The case study revealed a lack of hard evidence of the success of a project, which had been seen, as very effective and the way that the approach used in the Guide might be used to fill the evidence vacuum.

Evaluation of the Guide took place in the fourth session of the project and jointly with St. Helens. Many of the conclusions were shared with that project. A toolkit was seen as a useful help for this kind of initiative but it was felt that the current Guide needed too much interpretation to be used in this way. More guidance would be needed to use the materials in the Guide effectively and there was a need for checklists accompanied by examples of action.

It was felt that the Guide did not resolve the difficult question of value added and the concept of a Learning Town still needs development. Case studies, flow charts, the following of prompts and questions with suggestions for action were all mentioned. In essence the project, while seeking to acknowledge local diversity as a strength, was seeking a much more structured "how to do it" document than the Guide currently provides.

St. Austell and Newquay

Objectives

To create a strategic partnership that will develop a number of learning towns in the borough of Restormel.

The project manager is the Principal of St Austell College and he has played a key role in bringing together local agencies and interests to form the Restormel Action Group. The group includes the Chief Executive of Restormel Borough Council, business representatives and representatives of local town forums in Newquay and St. Austell. The strategy being developed is closely linked to the Objective 1 programme being developed in Cornwall in readiness for Objective 1 status.

Outcomes

The consultant to this project reports that the Learning Town concept has propelled the development of an integrated approach to learning and regeneration. The partnership has demonstrated a pattern for attention to negotiating and sharing values and also demonstrated the key roles individuals need to take in such a process.

Involvement in the pathfinder project has been useful in providing links with similar initiatives elsewhere. These have included the Objective 1 area in South Yorkshire and other pathfinder projects in Bristol and Kirklees.

A central feature of the work in Cornwall is a focus on the learning needs of small and medium enterprises and the consultant believes that the needs of such enterprises should form a focus for follow up Learning City activity.

So far as the use of the toolkit is concerned this initiative found it a useful basis for partnership development although local experience might suggest some revisions. The interim report suggested that the project manager had found it over sophisticated. The performance strand of the toolkit has been used as the basis for a checklist for use with partners' progress in developing local partnership.

Birmingham

Objectives

To develop a Learning City approach across the City Council and, in parallel, across a range of partners for the benefit of the local community.

Work towards this was to involve building an effective partnership between all the stakeholders in lifelong learning in the city, developing a Strategic Plan for lifelong learning and co-ordinating activities around the provision and marketing of opportunities.

The project was led by the City Council who were to use *Practice, Progress and Value* to shape a corporate framework and support the formative stages of the new Learning partnership. The project focused on two strands of the Guide.

The first part of the project was focused on the City Council itself and the need to co-ordinate and monitor lifelong learning in a systematic way. The second part developed from the need to develop a new learning partnership in Birmingham in response to Government policy and to build on foundations laid by an earlier learning forum in the City.

The Guide was used as a framework for the first exercise and it was hoped that it would be useful in shaping the second.

Outcomes

The toolkit was used to construct a corporate strategic framework for lifelong learning and to make the case for a Learning City approach within the City Council. It provided the basis for a grid used initially by departments to submit their corporate lifelong learning priorities.

The concept of the Learning City was introduced to the steering group of the Birmingham Learning partnership by the consultant to the project and the ambition to become a Learning City is embedded in the mission statement of the partnership.

In developing the City Council part of the project, problems arose in the interpretation of the grid documents by departments. By changing to a supported process focused on activities a more straightforward method was arrived at for confirming priorities.

There were also problems in making the strategy for lifelong learning an agenda for action. Activities in this area of development were interrupted by the need to produce a Lifelong Learning Development Plan for the City to comply with the requirements of the Standards Fund for Adult Education and reorganisation of both City Committee Structures and Departmental structures have also hindered forward movement on this project.

Considerable effort was invested in the development of the Learning partnership but, as with many other such groupings, the changes in structures proposed for post 16 Learning, advent of Local Learning and Skills Councils and changes in role for local partnerships all led to inactivity. It was not possible to make much progress beyond the production of the Local Learning Plan required by the DfEE.

The lessons that emerged for the Birmingham projects leader were that it was unwise to take on a project which was over ambitious. A small, more contained project would have been easier to assess and possibly easier to achieve.

It was also felt that it was easy to assume that the concept of the Learning City was easily understood. This did not prove to be the case. Ample time should be allowed to work through the concept. A further recommendation from this project was that the talk and discussion involved in the development of the concept need to be accompanied by concrete action and achievement.

So far as using the Guide was concerned, it was found useful in bringing the idea of a structure to lifelong learning in the authority and to engaging new and different departments in the development of lifelong learning. A clear definition of the Learning City has helped in promoting lifelong learning beyond the City Council as well. However, external agendas and particularly the demands of the DfEE have meant that the context and agendas have been changed over the life of the project. The development of new and different partnerships may mean that the building of the kinds of partnerships envisaged at the start of the project may take rather longer than hoped.

Bristol

Objectives

To analyse and develop Bristol lifelong learning partnerships including the Learning Works group and provider networks to widen participation and contribute to community regeneration.

The Guide was to be used as part of a process to "self assess" the current learning partnerships. It was hoped that new targets would be formulated to progress partnership working towards widening participation and that good practice would be discovered through working with other Pathfinder projects. This project was focused on Strand One of the Guide.

Outcomes

The consultant met with the project leaders and attended partnership meetings evaluating the efficacy of the partnership with the Guide as a tool. A survey of partners unable to attend meetings was carried out. The model used in Bristol, of local learning networks assessing needs and co-operatively meeting them has given both small community groups and conventional providers a clear idea of neighbourhood priorities.

It was clear that there are layers of partnership requiring different strategies in terms of support and engagement. In Bristol the multiplicity of partnerships has been a particular issue and one where the Guide was lacking in advice and guidance.

The Bristol project has a number of key messages to add to those in the Guide. Their experience is leading them to look at the possibility of reducing the number of partnerships to deal with the time commitment involved in sustaining them. It is felt that different sizes of groups of partners are appropriate for different functions.

A process of mapping partnerships is being undertaken to reveal the relationship between partners with the understanding that such relationships may look different to different players. The problems of communication in partnership have been revealed by the survey carried out with some recommendations about newsletters replacing formal minutes as well as rotation of meeting times to allow better participation.

The projects in Bristol believe that it is important that the "mission" of partnerships should be clearly understood and that the partners should align their own mission statements to that of the partnership. Agreement should also be sought on Performance Indicators and evaluation strategy at an early stage. In the particular partnerships in Bristol there has been a need to maintain a focus on adult learning within a general lifelong learning agenda.

Durham

Objectives

To establish a partnership to support social and economic regeneration through learning for the people of Durham.

Objectives included: the establishment of the partnership, identification and prioritising of learning needs in the city and the development of an action plan for improving skills and widening participation in learning.

The focus of the project has been the partnership strand of the Guide, although some attention has been given to the participation strand. The Guide has been used extensively by the two key officers included in the Pathfinder Project.

Work with the project consultant has concerned the holding of a consultative conference and summarising key messages from it. It has also involved a great deal of work with the partnership including individual consultation with Steering Group members, drafting and clarifying objectives, helping to develop useful baseline data and work to support development of Learning Shops.

Outcomes

The actions taken involved meetings and discussions, the consultative conference and individual meetings mentioned above and exchange of information on aims and objectives.

The project has encountered some problems. One is the development, during the life of the project of the Government's initiative for Learning partnerships. The project has also had difficulties in sustaining the interest of committed individuals in the past and a previous initiative had been disbanded for this reason.

The project is faced with significant challenges in relation to resources and employer engagement - although there is support for specific projects. However, marketing is a key area of interest and it is hoped that the setting up of a Learning Shop will be built on this. The project managers at Durham draw from their experience some essential components, which they believe must be in place if a Learning City initiative is to be successful in getting off the ground. These are:

- a local "worker" for the partnership with credibility across the local community;
- co-ordination by a neutral organisation;
- monitoring of project work; and
- a balance between talking and developing shared understandings and tangible activity and outcomes.

York

Objectives

To focus on links between higher education and secondary schools. The project's target group was young people with the capability of moving into higher education but no family or personal aspirations or experience that would lead them to do so.

The strands of the Guide most applicable to the project are the partnership and performance strands although the attempt to boost parental involvement might move into the territory covered by the participation strand. The project moved through all the levels in strand one of the Guide.

Outcomes

A series of activities have taken place in this project, moving from the establishment of partnership and agreeing of scope, targets and criteria for the project to the development of a project plan, evaluation plan and agreement on useful baseline data.

A full round of visits to higher education institutions and obtaining of feedback from visits took place and new partners are involved for year two. A further outcome was a successful application for Higher Education Funding Council funding for an extended phase of the project.

The project encountered problems in engaging parents in the initiative; an event to raise parents' awareness was poorly attended. However, help has been sought from the parents showing interest in the project in the task of engaging more parents and these lessons built into the second phase of the project.

The consultant to the project believes that a key to its success has been the very strong sense of ownership felt by partners and the time and detailed discussion spent in the development of the project delivery model. Clearly focused, task based meetings produced coherent proposals. A further essential ingredient was the flexibility built into the project, which allowed partners autonomy in delivering the elements for which they were responsible.

The Guide has been used by the learning city manager, and the evaluator and the project manager found the Guide a useful reference tool in the planning of the project. The Guide has also provided a clear framework within which to set evaluation activities. However, the Guide does not offer practical examples of how to undertake the kind of evaluation exercises necessary such as setting baseline data, providing a framework for participant feedback or the development of a model to assess impact.

Middlesborough

Objectives

To bring together three strands of local authority activity: raising achievement in schools, increasing prosperity for citizens through higher employment levels and increasing social exclusion.

The proposal formed part of Education Action Zone development and was to use the toolkit in developing the Learning partnership that was envisaged to take work further.

Outcomes

At the stage of the interim report the project had barely begun its activities but it was becoming clear that the focus had shifted to the establishment of a corporate partnership to support and promote community use of schools. This was seen as a key strategy in raising achievement by engaging with parents and employers and strengthening links between lifelong learning and regeneration activities.

The consultant's report clearly outlines the purpose of the initiative indicating that this should provide a range of benefits for parents in equipping them to help with their children's learning and developing their own learning potential. The initiative would also help schools to engage business in developing teacher/business exchanges, providing placements and work experience and help to encourage an improved work related curriculum.

The project would set in train a process whereby better use of school premises would result from projects that would promote leisure, learning and regeneration. The consultant then sent the project a schedule of the stages that needed to be undertaken in setting up the project and in evaluating it. The report does not mention the use of the Guide in the project work nor has any report further to that of the consultant been received from the project. It is not possible to be sure from the information received the extent of the project's final progress, the benefits gained, how the Guide was used or its usefulness.

Greenwich

Objectives

To enable the Greenwich Learning partnership to develop a coherent framework for linking a whole series of initiatives with a focus on lifelong learning.

These included among others SRB Projects, Education Action Zone activity and Excellence in Cities. The changes to be made to the infrastructure to support learning post 16 and the change of emphasis on the role of Learning partnerships, together with the complexities involved in the setting up of such partnerships and the new Learning and Skills Councils in London have presented a challenge to the project.

The project leader believes that many of these new partnership initiatives and their interest in evaluating the activity for which they are responsible show much of the same philosophy as underpins the development of Learning City ideas and concepts.

Outcomes

The project is operating at a number of different levels in different strands, the Greenwich Learning partnership is in a state of transition and is likely to remain so until the main planks of the new structure for learning post 16 are in place. One issue that has clearly emerged is that there is no agreement among providers as to who should be responsible for strategy in relation to training in the Borough. This was a concern shared by the consultant working with Greenwich. It is a matter currently under discussion by both the partnership and the Borough Council.

The lack of resources to provide even secretarial support for the Learning partnership has meant that keeping momentum going has been difficult. This factor, alongside the complexities of the development of structures in London, has limited the progress possible in this initiative.

There is no information in either the final report of the project or the consultant's report on the use of the Guide.

Kirklees

Objectives

To build on the existing post 16 partnerships in Huddersfield, thereby encouraging working together to improve coherence in lifelong learning provision and widening participation. The project focused on the Partnership strand of the Guide.

A particular objective was to broaden the existing partnership to include schools and increase participation from the voluntary sector, trade unions, employers and the media.

The consultation, the use of the toolkit and the setting up of the Learning partnership revealed that the partnership in Kirklees was not as robust as had been believed. Considerable work had to be done in building the partnership and much time was spent in the activities in level one of the partnership strand which relate to beginning processes of partnership. The beginning of shared understanding is now emerging.

Outcomes

Among the problems encountered were confusion over the scope and powers of overlapping partnerships and their effect of the formation of Learning City initiatives. This was one of the issues in the Bristol project as well as this one. Other problems were caused by the competitive nature of many funding streams and in the case of this project a focus on 16-19 agendas and difficulty of getting adequate consideration of adult issues.

During the life of the project, a protocol for the Learning partnership has been agreed and it has been recognised by the Government Office. Early goals in student support have been agreed, Local Learning Plans drafted and individual plans approved and a seconded post put in place. A system for leading individual initiatives has been put in place.

Kirklees feel that any partnership getting established needs a well-known charismatic figure to chair the partnership and ensure publicity, and adequate funding to support activity. Perhaps most of all, it requires from partners a lessening of devotion to sectoral interest and a willingness to contemplate actions not of direct benefit to their institution. Having an outside consultant who is neutral was of particular use to this project.

So far as using the Guide was concerned, this project found it a useful tool to analyse progress and decide priorities. They found the strategies in strand 1 practical, pragmatic and a useful way through periods when the partnership was bogged down and overloaded by initiatives.

ii) Marketing Learning and Developing Guidance Projects

Norwich

Objectives

To promote a culture of lifelong learning in the Norwich.

The Pathfinder project used the Guide in evaluating the success or otherwise of the marketing of learning. The initial project proposal indicated interest in pursuing the participation strand of the Guide but the final project report's main focus is on the usefulness of the Guide in relation to evaluating performance.

The Guide was used mainly as a background document and a basis for reflection. The matrices within it were found to be less useful.

The particular activities that the project focused on developing evaluation tools for were the Learning Festival, the Learning Shop and the SRB 5 project operating in the City, which has a focus on community participation.

Outcomes

It was found very difficult to evaluate the Learning Festival because there was no established useful base line data. The number of changing variables from different providers made any kind of exercise extremely complicated. However, an effort was made to produce a plan for looking at a number of indicators that would indicate the success of the Festival for this year. These included the development of guidance targets and evaluation of participation rates.

So far as the Learning Shop was concerned, the city has established a cohort of base line information through a survey of 300 clients of the 18,000 using the shop during the year. The 300 survey provides information on the gender, age of users, patterns of attendance and response to the survey. It is clear from this work that the Learning Shop is good at reaching people who are thinking about learning and from this group it was able to attract a mixture of ethnic groups and those with an interest in basic skills. The Shop is not effective in reaching those who have not contemplated learning. Other strategies are needed to evince an interest from those with no current intention of taking part in learning activities.

The evaluation of the SRB5 project is of key interest to the Learning City initiative as all partners are involved in the delivery of this large initiative. The toolkit has been used as a starting point in evaluating SRB5, and there has been a great deal of interest in Norwich in the use of the Local Government Management Board "Learning from Complexity Pack". There is still a great deal to be done in the development of evaluation strategies for this area of work.

During the life of the project a number of key staff in Norwich became interested in the learning from complexity materials and how these might be used in evaluation. There was particular interest in the areas of cultural transmission and increased returns, which are part of the Pack's approach.

The project felt that the Guide was a useful background document, but they did not find it easy to use in relation to the specific projects they wished to evaluate.

Southampton

Objectives

To develop a system for assessing the value of Learning Shops. The original project bid included, developing a shared understanding of the objectives of Learning Shops, identifying performance indicators and targets, developing ways of collecting and monitoring data and consideration of the ways that Shops might extend their role.

For the purposes of the Pathfinder project, evaluation has been based on Strand 3 of the Guide, focusing on performance. The Guide is set at a strategic level and, because the project itself was involved with the development of the partnerships and activity that were field based, it was not found to be very user friendly. The work done with the shop in Southampton was drawn from the Guide, but also the current Local Authority good practice.

Outcomes

Four Learning Shops have been established to date; three in library facilities and one in a community shop. A particular Shop that was a focus of the project is located in a library and most of the work done in it related to school age children. Few adults have been engaged and none in the 40 - 55 age range. The Shops are not guidance shops. They are effectively IT learning centres with very limited learner support. Library staff provide this and it is felt that the kind of support is not adequate if those attending are not competent in their use of IT.

The issues that emerged from the project include, the problem mentioned above in relation to learner support, but also issues in relation to access in terms of opening hours. Libraries based in the community tend to have quite restricted opening hours which do not fit in well with likely patterns of use of an IT centre. It has been difficult to market and raise awareness of the Shops, particularly among the target client group and for some of these prospective learners, the library environment would not be a comfortable one.

The Partnership involved in the development has been a successful one, but there is a need to engage partnerships fully at both strategic and operational level. Resources are inevitably an issue impacting on all the other issues mentioned above.

The Guide was not considered user friendly, which would be an issue if used by community groups. There was a request to extend frameworks, which would help initiatives follow a structured process. However, using the Guide enabled the initiative to set about the work in a constructive way, creating an aims and objectives matrix with performance indicators.

Stockton-on-Tees

Objectives

To work closely with the Darlington project to share meetings and consultants, both on the use of the Guide and on marketing. An initial joint meeting with Darlington and the consultant resulted in the planning both of work on the project, the development of a marketing strategy and evaluation of using the "Learning Town" concept in marketing, and the use of consultancy available through the project.

The marketing consultant used by the project participated in workshops on the issues in marketing learning in disadvantaged communities and produced a feedback report for the Learning Town's Board. This activity was followed by a seminar to develop strategy, which resulted in ten potential marketing projects being incorporated into a Marketing and Development Plan for Stockton's Learning Towns. Funding and support are being sought for the projects from both challenge funds available locally and national funding streams.

Outcomes

The lack of specific funding and need to diversify funding sources as a result has been one of the problems faced by this project. Further difficulties have been the commitment of some partner organisations and the maintenance of momentum.

Essential in the development of marketing initiatives and partnerships in connection with Learning Communities are keeping a sense of focus, employing consultants who are fit for the job to be undertaken, being prepared to modify projects as circumstances may demand and ensuring enough resources have been invested in the project from the start. This project benefited significantly from the shared work with Darlington and felt that sharing work with a similar project was essential to their progress.

So far as working in partnership is concerned the project leader felt a key skill was learning to listen to all partners and not just the most forceful and that consultation with residents was time consuming but highly rewarding. The partnership exercise had involved significant learning particularly so far as maintenance and motivation of partnerships were concerned.

Derby

Objectives

To develop a community based marketing strategy for learning in the four target wards being prioritised by the Learning City initiative. Four separate and defined phases were planned: initial survey; research and assessment; development of the strategy, and the first phase of implementation. The survey and assessment were to focus on one ward with the practicalities of subsequent work being considered only on the basis of the results of work in the first ward. Initial work by the consultant resulted in selection of the first target area.

The particular ward chosen exhibited considerable deprivation. Early work indicated a need for extensive groundwork before marketing learning was likely to be at all productive.

Outcomes

The work in the ward selected has resulted in the close involvement of the learning city initiative with the ward action group, which deals with social issues such as crime and disorder. This group is in the process of using European Social Fund money to recruit a community worker from within the community to be trained to work in the area. One of the items in this worker's remit will be dealing with learning issues as conditions allow.

During the project the consultant performed an audit of current participation in the learning from the area. Other work has been focused on involvement with the Ward Action Group including attendance at an "Away Day", co-ordinating activity in developing parenting skills training and working on the arrangements surrounding the recruitment of the worker.

Among the difficulties encountered by this project has been a lack of appreciation of the obstacles in the way of engaging in learning at a local level and the initial cynicism of both residents and community workers. It is felt that the project has made progress in overcoming this. Further difficulties resulted from the lack of both time and financial resources to drive the initiative forward.

The Guide was of little assistance to this project. The activities in the Guide related to operations that seemed irrelevant in dealing with the huge issues of social exclusion met within the target area and issues of partnership working in very excluded communities. The Guide was not flexible enough to be adapted to such circumstances and, if there were a toolkit that could help in this context, it would need to be highly adaptable to local circumstances.

Darlington

Objectives

To market learning to groups who would not normally participate. The marketing project known as the Passport project is to encourage participation, have a range of entry points and progression opportunities and invite partner involvement. The project intended to involve employers among the partnership and to work across social and cultural boundaries to appeal to individuals, families and groups of learners.

This project, together with Stockton, have worked in partnership throughout the Pathfinder initiative.

Outcomes

There has been considerable activity in relation to the Passport project. This has included a report from marketing consultants with useful input into the process of launching an Action pack for the project. The Action Pack has been completed in draft and the steering group for the project is actively involved in seeking funding both for the action pack and the Launch of the Learning Town initiative.

However, like many other projects involved in the Pathfinder Initiative this project has been deflected by the business of setting up the Learning partnership and the Development of the local authority's Lifelong Learning Development Plan. The Darlington project co-ordinator believes that a dedicated worker for the Learning Town initiative is a necessity if substantial progress is to be made.

Problems within the initiative have included a lack of follow up commitment to initial enthusiasm, the lack of a single organisation prepared to drive the initiative forward, an excess of strategic discussion without operational activity and problems resulting from lack of funding.

This project would recommend dedicated staff time and appropriate delegation to operational staff to enable action to be agreed and put into place without lengthy consultation. The project clearly benefited from the use of consultant time and the shared work with Stockton.

For both the Stockton and Darlington projects there were issues with the use of the Guide. Some related to the format and construction of the document but in preparing useful guidance for partnerships it was felt that some or all of the following would have been useful:

- a section on the benefits of partnership;
- help on the issue of losing partner commitment;
- more on resource issues;
- emphasis on the need for concrete action;
- a section on the role of co-ordinator including matters relating to their management, setting of targets and evaluation of performance; and
- checklists and questionnaires that could be pulled out and used independently would add greatly to the Guide's usefulness.

iii) Information and Communications Technologies (ICT) Projects

Swansea

Objectives

To develop ways to ensure that communities in disadvantaged areas were able to use and benefit from the use of new learning technologies. The Guide was to be used in the establishment of the community partnership that would take forward proposals.

The key questions that the project set out to address were:

- will an informal community partnership sustain the development of a strategy for the use of ICT in community learning initiatives?
- how do we measure the effectiveness of community partnerships in regeneration?
- what is the potential to develop a Community Foundation model to underpin the partnership?

The themes to be addressed were:

- the desirability of a community learning partnership;
- how the learning needs of a community might be assessed; and
- the establishment and the responsiveness of the infrastructure of a learning community.

These themes were to be explored with a group of projects being set up under different initiatives in one area of Swansea. A number of the projects related to IT based learning initiatives.

Outcomes

Meetings of the projects facilitated by the Community Education Service were held in the Spring and a further workshop event in July established some key characteristics for a community based network that would act as a central focus for learning city developments in the particular area targeted. It was felt that the overall mission and strategy of the learning city initiative could be seen as an enabling framework within which each of the individual projects could make a useful contribution.

The activities of the project have very much been about the setting up of a partnership. The Community Education Service has taken the lead but others are active partnership members. An existing Professional Support Group in the target area will form the foundation for the partnership. The result of the July meeting was a shared understanding of the kind of partnership that would be effective and the characteristics of a partnership that would work for those involved.

The meeting in July also raised concerns about the structures inherent in the learning city initiative from both inside and outside the local authority. Within the authority there was a feeling that the Education Department dominated the initiative and outside there were issues about inclusiveness and representation. The interest in the initiative demonstrated is a positive sign and there are plans to address these concerns.

The Guide has been used in Swansea as a framework for setting up partnerships and provided useful ideas for dealing with the key issues involved. However there was a feeling that the Guide would have been more useful if it had been more concrete in guiding users through a series of questions. There was a need to develop local checklists, guides and tools that were appropriate for "field level" potential partners.

The project felt that the Pathfinder project had enabled progress to be made on a key area in learning city development. There had been clear gains in terms of partnership and commitment to joint working. The issue of assessment of community learning needs had not been addressed through the project as anticipated at the beginning, but the establishment of shared criteria for a community partnership and a commitment to such a partnership represented a significant move forward within the learning city initiative.

West Berkshire

Objectives

To facilitate the development of an electronic community network through a process of planning and review.

This was a direct response to the number of initiatives and actions that have involved the growth in new technologies in West Berkshire. The Project has attempted to take a strategic and reflective approach to co-ordinating these developments to ensure the maximum benefit for local people. The community network was to be guided by the principles of partnership, participation and performance.

Outcomes

The initial partnership involved in this project was the West Berkshire Targets Taskforce Partnership but in the final report it is clear that this group has been succeeded by the Learning partnership for West Berkshire. The Pathfinder Project has become part of the brief of this new partnership. The network is not yet a reality but the project has allowed planning which should make it real in this year. The project has been crucial in the development of the network and particularly in establishing the pace at which such development might take place.

The project did not focus on one specific strand of the Guide, feeling that improvement was more likely from tackling the interconnectivity of all three strands. At the heart of this thinking is the need to change and challenge partnerships with new and different members while at the same time building an atmosphere of trust and understanding. This is seen as a key need if Learning partnerships are to be successful.

The partnership involved with the project has progressed to a position that demonstrates a development of shared understanding. Changes in local partnership arrangements during the year have made progress slower than had been hoped and the period for reflection on roles and priorities hoped for has not been possible.

This project is unusual in having chosen to focus some of its activity on the participation strand of the Guide. It was made clear in the Guide itself that although many learning community initiatives were committed to working with local communities the examples of building shared understanding and a dialogue with communities were rare. Most examples in the Guide are drawn from experience outside learning community initiatives. For West Berkshire the changes necessary to approach such a dialogue would involve fundamental change although local individual examples of community consultation were prevalent. ICT is seen as an essential in setting up such communication.

The project was interested in the performance strand but was not able to deal with it within the time available.

As the project focused on ICT the key area of interest was participation and how ICT might be used to both widen participation in learning and also in active citizenship. Initial discussion was felt to be too academic and intangible to be of use and was replaced by a more practical project involving school sixth former video-conferencing with local councillors as part of a series of events for Local Democracy Week.

This project believes that its activities over the past year have resulted in substantial learning in relation to the development of ICT in local areas, which are likely to be of use to other Learning partnerships. The main recommendations are as follows:

- learning partnerships should have a sub-group that solely concentrates upon the new technologies to co-ordinate all the national ICT initiatives;
- there is a need to build an area strategy supported by the community that integrates and/or relates the welter of initiatives and national objectives engaging communities in the process of building a sense of ownership of public access ICT;
- some basic performance indicators that go beyond simple user numbers should be used to ensure that quality/best value/value added is provided from ICT infrastructure; and

- attention needs to be given to the need to invest in technical support, to ensure that systems placed in community venues and schools can achieve compatibility and to advances in digital television which could fundamentally change the availability of access to ICT.

The result of the project for the West Berkshire partnership was a chance to reflect on progress as a partnership with new technologies - an area seen as dominated by actions but enlightened by little proper research and reflection. The action plan developed from the project involves dealing with the development of the South East Grid for Learning, developing performance indicators, identifying progression routes from informal tasters to course provision and following up issues of democratic participation. It also includes more time, hopefully with consultants, for research and reflection.

Sheffield - Citinet Project

Objectives

The development and extension of an electronic network of private sector, public sector and community based learning. The project expressed an interest in all strands of the toolkit in its application for funding.

The project is built around a partnership, which is to include all the organisations, large and small that are involved with the running of the Learning Centres in Sheffield. The idea of the project is to extend access and co-ordinate learning centre activity. The Citinet project itself was not a Pathfinder activity, but the Pathfinder project was one of the tools, which Sheffield used in its evaluation of the development of the Citinet network.

Cinet has initiated a dynamic structure offering a hierarchy of learning centres, ranging from an information point to learning centres, which have a range of student support services. All centres have to comply with a required standard. The evaluation carried out was partly looking at progress to date with initiatives and partly looking at the challenges that were likely as a result of Ufi developments. The Sheffield evaluation had a number of strands itself, using the Guide 'Practice, Progress and Value', the initial Citinet prospectus and response to evaluation questionnaires sent to the Citinet Steering Group as tools in the evaluation.

Outcomes

The Guide was found to be a useful way of checking on the setting up of Citinet, its performance, progress and effectiveness. It was also found useful to see what had been achieved elsewhere and how value-added might be dealt with.

Using the partnership strand, it was clear certain desirable characteristics were present in the initiative. An agreement had been delivered and a number of key participants were involved, although it was felt that Trade Unions, Commerce and Industry and the Public Sector employers might need to be included. They were absent from the current Citinet partnership. There was an understanding that the participation strand was not well developed in the Citinet project and the performance strand in particular was not begun in the current initiative.

As a part of this three-stage initiative, it would seem from the Project report that the Guide was useful, including the recommendations of the consultant used through the Pathfinder funding. These were fed into the evaluation process and many of them have been taken on by the project.

3. Using Practice, Progress and Value

The Guide *Practice, Progress and Value* was produced before the advent of learning partnerships and, of course, before the proposed reorganisation of structures for Post 16 education and training in England and Wales. In the light of the development of these partnerships and the very real effects they will have on the context in the Learning Communities operate, it has become clear that any revision to the Guide in its present form would be of limited use. A total rewriting of the Guide in terms that took account of the new structures would be required. This is beyond the scope of the current project and would be impossible at the present time when it is not clear what the new arrangements will look like on the ground.

That guidance and help is needed is demonstrated by the willingness of projects to engage with the use of the toolkit in its current form despite the challenges presented by the changes outlined above.

Background

In the construction of *Practice, Progress and Value* consideration was given to the possibility of producing a structured guide to developing the structure of a Learning Community. Instead, it was decided that local variations where such that this would be inappropriate. The Guide was intended to provide a loose structure within which initiatives could construct their locally distinctive form of Learning Community. However, it would seem from much of the feedback that this form of guide was not useful to projects.

A range of projects wanted a much more structured "how to do it" guide for the development of initiatives. There is a consistent strand running through the projects regretting the absence in the Guide of checklists, structured series of questions, flowcharts, prompts and sets of evaluation exercises. One project states the need for a structured work pack for initiatives.

Among the projects that found the Guide useful some of the more structured elements were particularly appreciated. The matrices were seen by one project as offering a structured approach to work and the idea of aiming for structure was seen as a key advantage given by using the Guide by a number of projects.

Many projects found the Guide too complex and multi-layered to use. The project in Blackburn and Darwen found using a facilitator enabled them to be more effective and to use the Guide with a group. Other projects found the use of project consultants helpful in working through the steps in *Practice, Progress and Value* and using the Guide in a locally appropriate way.

For some projects the Guide did not give enough scope to local players. Although structured checklists were requested, there was hope that these would be adaptable to

local circumstances and many projects drew up locally appropriate checklists to fill this perceived gap.

There were a number of criticisms of the Guide as a tool for working at field level and with partnerships that were more operational than strategic. In Derby the kind of arrangements, protocols and forms of partnership described seemed completely irrelevant to partnership activities with a community association in a deprived ward of the city, and there were similar problems mentioned in relation to the project in Swansea and Southampton. All these projects were geared towards specific community groups rather than the strategic partnership initiatives the Guide sets out to address in its partnership strand.

Further difficulties were experienced in the use of the Guide for evaluation. Although projects found the three levels a useful focus for evaluation, they found the Guide did not take forward the processes to be used in nearly enough detail. There was no guidance as to the types or sources of data that would best be used as a foundation for identifying or setting targets. Again projects stressed the need for examples, of baseline data, possible evaluation exercises and case studies for modelling activity. Specific suggestions for action in this area were sought by more than one project.

The final section of the section on *Practice, Progress and Value* was felt to be complex and over-sophisticated by some projects and for others the concept of Value added remained unresolved. It was clear from reactions at the Conference of projects held in the summer of 1999 that this section was difficult to use in practical exercises, not only because of its complexity but because some outputs were medium and long-term, whereas the projects had been relatively short-lived.

With these criticisms strongly voiced by the projects, what lessons might be drawn for Learning partnerships and those hoping to provide guidance for them? In essence five strong messages seem to emerge:

- evaluation of partnership initiative remains an area whence there is a need for guidance on good practice;
- it seems likely that material to support Partnership projects would be most appreciated if it were produced as a structured work pack with series of exercises that can be adapted to local circumstances;
- there may be two different kinds of material needed. One for strategic activity and another needed for field centred partnerships;
- the issue of baseline data and choice of baseline data is one where Learning communities could benefit from particular guidance; and
- any guidance should make full use of examples and case studies.

There is a need for better guidance for learning partnership projects and for many, *Practice, Progress and Value* provided some part of what was needed. As a background document and as a means of introducing structure into the evaluation of partnership activity, projects found it useful. For many it provided a stimulus and a reference tool. For one project it provided a tool to "Analyse progress, decide priorities and provide practical pragmatic strategies when partnerships got bogged down".

However, in essence the Guide should be seen as a step in the right direction to be improved by a more practical approach it is to be of real use to initiatives.

4. Pathfinder Projects and Lessons for Learning Communities

Although the Pathfinder projects were designed to test Practice, Progress and Value, they also involved considerable work on the part of Learning Community initiatives in developing local activity. Some of the progress made and challenges faced by projects re-enforces the points made within the Guide, some suggests new advice. This final part of the report summarises some of this material which is a valuable resource for other projects.

Partnership was, and remains, the most developed strand of activity in Learning Community Initiatives and much of the advice and essential lessons coming from the Pathfinder Projects reflects or strengthens the suggestions for action given in the Guide. In particular the following messages are strongly re-enforced:

- the need to combine talk and the development of shared vision with practical action and achievement to secure and retain commitment;
- the value of a "Patron" or "champion", a substantial figure prepared to act as a figurehead for the project providing credibility and status;
- the need for an "honest broker" at the heart of the project to ensure that the project/partnership doesn't become the property of a particular sectoral interest;
- the necessity of involving a wide range of partners and of developing clarity about what is required of those who are involved;
- projects are conscious of the need for evaluation but rarely engage in the process of defining the means of evaluation at an early enough stage; and
- there are real issues for all initiatives in maintaining momentum and commitment. Even the most successful has found the status of members of the core group decreasing as other calls press on members' time. When this happens communication and high profile activities become even more important for strategic level partnerships.

The Pathfinder projects added some new messages to those present in the Guide. The projects inevitably started from different backgrounds and had differing aims but in spite of this some generally applicable points come from the experience of this wide range of initiatives.

Learning Community initiatives/other partnerships, do not start from nowhere. Within the partners there are histories of successful/unsuccessful work and many will be engaged in other partnerships alongside the main one. These affect joint working and such effects can be adverse as well as positive. Awareness of "history" is important. So also is the development of a sense of ownership most clearly expressed in the York project by those designing and using a project to attract non-conventional entrants to Higher Education.

All initiatives need resources, at an early stage these can be found through the enthusiasm and commitment of members but real commitment results from the allocation of resources and many initiatives find they cannot move forward effectively without at the v" least the finances to support a co-ordinator. Sometimes these have been found through project or challenge funding rather than through the contribution of partners.

Projects need to produce tangible benefits within a reasonable period. Those initiatives that have been most successful have had clearly recognisable outcomes. Examples

include marketing campaigns, the attraction of funding, the setting up of a learning shop. The projects have reflected the value of sharing good practice with others. E.g. Stockton and Darlington have profited from the opportunity to liaise with other partnerships offered by the Pathfinder Programme. The use of consultants, bringing an outside perspective to initiatives, has also been a recognisable benefit for some quite outside the role of facilitating use of the Guide. In marketing and promoting learning the projects were keen to stress the need to focus on the benefits of learning to the learner rather than simply inviting access to opportunities.

In terms of the Participation of Communities in developing themselves some telling points were made by the Pathfinder projects about the realities of engaging with communities and community groups.

There is a message that for the most disadvantaged communities the idea of assessing learning needs must follow considerable capacity building activity and trust building. In working with community groups there is a need to attend to their agendas and work to protocols they set if they are to be involved in partnership.

It is also made clear from the West Berkshire project that although there may be a good fit between the many kinds of community consultation going on and the development of participation in formal and informal learning, little has been done to make the links necessary to profit from the connection.

In terms of the development of technology there is a firm recommendation that this issue is considered seriously but by a separate sub-group of any partnership with a grasp of the particular issues involved and a knowledge of the span of local infrastructure being created by different initiatives.

5. Conclusion

The question of evaluation and added value was the starting place for the Guide and is the final issue to be discussed in this report.

Projects are still struggling with these issues and the Guide, while providing signposts for action, has not given initiatives a clear path to follow in isolating the benefits of their activities. There remain unanswered questions about appropriate baseline data, the variables that affect different communities and how value added can be assessed in such complex multi-faceted initiatives. Benchmarking across single services is complex enough. The idea of benchmarking across whole communities remains a challenge.

During the life of this set of projects, the whole context for partnerships has changed not once, in the formation of learning partnerships, but twice with the coming of the local Learning and Skills Councils. It will be a challenge for these new bodies to use the experience of existing partnerships to inform the development of new and different ways to change the learning culture.