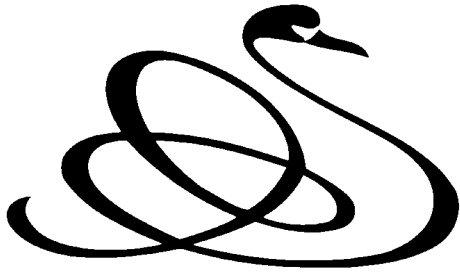


York Consulting

NATIONAL COUNCIL - ELWa

EVALUATION OF ADULT LEARNERS' FORUMS

October 2003



York Consulting

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EXECUTIVE SUMMARY

Context and Background

1. This report details the findings of the evaluation of a pilot programme of Adult Learners' Forums (ALFs) operated between December 2001 and February 2003. The pilot was a joint partnership funded by the National Council for Education and Training for Wales (NC-ELWa) and the National Institute of Adult Continuing Education Dysgu Cymru (NDC). The evaluation was carried out by York Consulting between July and October 2003.
2. NC-ELWa's Market Intelligence Team has recently developed a Customer Research Strategy (CRS) to provide an understanding of learner needs, motivation and satisfaction. The aim is to inform and direct policies, and to guide further product development and marketing communications activity. A secondary aim is to understand what motivates customers to learn, in order to widen and deepen participation in learning and understand what customers think of the education and learning services they receive. Adult Learners' Forums have formed part of this overall activity.
3. The objective of the pilot programme was to establish and manage four learners' forums. One forum would be set up in each of the four Welsh regions, and would operate at Community Consortium for Education and Training (CCET) level. Each would be made up of a core twelve existing adult learners from a range of providers and learning backgrounds. The forums were to meet four times throughout the life of the project and discuss issues agreed by the Steering Group.
4. For NC-ELWa, the primary aim of the pilots was to explore the needs and views of learners, and assess whether this mechanism would provide a useful tool by which learners' opinions could be fed back to NC-ELWa on a regular basis.
5. NDC's motivation for being involved in the pilot programme was slightly different. They represent post-16 learners and regard themselves to be 'the voice of the learners'. From NDC's perspective, the forums were about 'empowering' the learner, and letting them set the agenda.

Management

6. There was a clear partnership arrangement to set up and deliver the project, with clear structures and processes to manage its development. Both parties agreed that the learner should have a recognised voice within the debate on policy development, and that the forums could offer a collective learners' voice.
7. Due consideration was given to a number of factors which could impact on the successful outcome of the project, such as the role of the facilitators, the responsibility of the Steering Group and recruitment and engagement of learners. However, although discussed, it was not possible to secure funding for these elements once the project was established.
8. Operationally, there were clear objectives for the Project Officer to fulfil which would determine the successful delivery of the project, and a mechanism was in place (the Steering Group) to discuss potential problems should they arise.

Purpose

9. There is evidence that from the outset, the partnership had different views on the purpose of the pilot. For NDC, the project was about setting up a network of forums that would regularly meet to discuss the issues that affected their learning experiences. It was intended to be an evolutionary process where the learners would have the opportunity to identify their own agenda.
10. For NC-ELWa, whilst it was recognised that this was about empowering the learners, the focus was about generating feedback against a framework of issues that could be used as an evidence base for policy decisions. This was a research project to test how effective this method could be.
11. Despite NDC's and NC-ELWa's views on the purpose of the project, for both parties, the central outcome for success had to be that the feedback from the learners' forum was used, allowing them to influence policy development through a collective voice. This could be through further discussion at the All Wales Adult Learners' Forum (AWALF) where issues could be fostered and presented to panels of policy makers; or by being fed directly into CCETs, local providers, regional NC-ELWa offices or policy teams nationally.

Operation

12. All twenty-one CCETs were invited to put forward a proposal for involvement in the project. Five CCET areas were selected to operate a forum. This was an increase from the original plan of four due to the number and quality of bids received from one region. A facilitator was appointed locally to coordinate the forums, responsible for recruiting the learners, setting up the meetings and securing a venue.
13. Awareness raising sessions were held in each of the successful areas to engage the providers and secure commitment to the pilot programme. Facilitators were to select learners from a range of providers and learning backgrounds based on their local knowledge.
14. The Project Officer was to attend and support facilitation at each of the meetings. Each forum was to meet four times throughout the life of the project; learners were to discuss their experiences against a framework of questions agreed by the Steering Group. The feedback would then be presented to the Steering Group by the local facilitators.
15. The other formal reporting mechanism established in the contract was the production of an evaluation report of the pilot year to inform ELWa's planning process for the 2003/2004 financial year.

Issues at the Local Level

16. There were clear difficulties with the set up and operation of each of the forums. Forums operated in five areas, Dolen Dysg Dinbych, Powys, Torfaen, Pembrokeshire and Bridgend, although for two (Pembrokeshire and Powys), this was not in line with the methodology agreed. The amendments were agreed with the Steering Group, but the problems associated with the change in approach highlights clear issues for consideration in assessing whether forums could be sustainable in the future.

Facilitator Commitment

17. One of the primary considerations for the successful outcome of the project is that the facilitator must have the time and inclination to ensure the forums are established as they were intended. In this pilot, the facilitators were paid for their travel and expenses, but all other involvement was part of the overall duties in their existing job. This has implications for the priority this was given, and therefore the pilot's probability of success.

18. Furthermore, the facilitators were not given responsibility for hosting the meetings, as there was no funding for training and development. It would be unfeasible for one person to attend meetings in all twenty-one CCET areas, if the pilot was rolled out nationally.
19. In communication between the Project Officer and the Project Manager, it was identified that commitment from the facilitators was generally low. This is unsurprising as the main bulk of responsibility was voluntary.

Learner Recruitment and Attendance

20. The issue of learner recruitment and attendance was a problem across all forums, except Pembrokeshire. Learners were not allocated funding for their travel and expenses, and the recruitment strategy was left to the individual facilitator.
21. Evidence from a survey of some learners on why they had ceased attending highlighted that personal issues, such as child care, time, expense etc. impacted on their ability to attend. In Pembrokeshire, the forum was well established and held at the place of learning so may not have required additional time/expense to attend. This is a key factor when considering the future of such activity.
22. Other younger learners identified that they did not fully understand why they had been invited to attend and what their role was. This also impacted on attendance.

Representation

23. The pilot was intended to bring together a representative group of learners in order that the issues that impact on different learner groups could be fully reflected. However, as attendance at the forums was not consistent it is not clear whether this was achieved.
24. Furthermore, the forums were expected to generate an evolutionary discussion, and be able to reflect how the same group of learners' views changed over a period of time. As the exact same group of learners did not generally attend each week, it is doubtful whether this was achieved.

Reporting and Feedback

25. It does not appear that either party, considered to any great extent, the core aspects of reporting outcomes and implications of the research. The focus of the debate was on how the forums would be established and managed in operation. Mention was made at various stages (set up, in the contract and in the Steering Group remit), that consideration must be given for how the information was going to be used. However, there was no formal agreement on who would be the audience for the information outside of the Steering Group, and how it would be presented (other than a one-off dissemination event).
26. A fundamental issue when setting up a consultation process is how the information is recorded. Focus groups are often recorded and transcribed or detailed notes are taken, whereas forums tend not to be recorded but produce an action plan as an outcome. Neither of these approaches were discussed or properly adopted, and there was no expectation of how the information would be reported back.
27. The final output for the project was the report, 'Developing Learners' Forums in Wales'. A dissemination event was also held at the end of the pilot, attended by learners, providers and CCET representatives. The event largely focused on the learners' experiences of both the project and learning in general. An Executive Summary of the draft report was circulated at this event.
28. The final report published a breakdown of the comments made by the learners against the framework of questions for the four meetings. Whilst the comments have generic value, little guidance or action can be taken from them, as the comments are not published in learner context, and there is little analysis of what the implications of these comments are.
29. A further problem with the reporting was the recording of which learners attended the meetings. The learners who either attended meetings or answered the questionnaires are profiled together in the final report for each CCET area, for the whole project period. No comment is made of which learners attended which meetings.

30. In summary, whilst the forums largely achieved the objectives of establishment and operation (except where the local situation prevented this), they did not fulfil the criteria that were set for them to be regarded as successful. Information was generated for the report, but it is not clear who it was made by and in what context. The views cannot be regarded as representative as it is not possible to make a judgement on which types of learners were feeding back. Finally, the discussions were not part of a 'true' evolutionary process, as different groups of learners attended the meetings over the course of the project.

Stakeholders View of the Forums

31. Whilst the stakeholders from provider/policy development teams had not generally heard of the research, they were interested in the concept of direct engagement with learners. There was an overall impression that this was a very 'worthy' project and appeared to be innovative in its approach.
32. Other positive comments focused on the importance of bringing learners into the debate on policy development and provider management. In essence, there was wide ranging support for consulting with learners on a face-to-face basis to inform decision-making.
33. In the main, the stakeholders interviewed tended to appreciate that learners had a role to play in developing policy but did not feel that a significant benefit could be realised from the forums in their current format.
34. The main criticism was that the comments could not be analysed in any structured way as a result of the way in which they were reported. However, it was also questioned that even if they covered specific issues, as the groups were supposed to be representative of all learners, would it be possible to have a detailed enough discussion on specific issues that NC-ELWa could learn valuable lessons from.
35. The general consensus was that the learners' forums lacked focus in what was discussed and how the information was reported. There was a concern that only the more 'vocal' learners would be involved, and the real issues would not be covered in any depth. The key issue for the stakeholders was that there was no clear purpose of what the forums were trying to achieve. For them to be of real value to NC-ELWa, they would need to address a specific policy issue or an attributed group of providers. However, this conflicts with NDC's aim of empowering the learner to discuss the issues they feel are relevant.

Other Research Into Consultation

36. There has been significant research into consulting with learners to understand which method works best in different situations. Clear distinctions are made between focus groups and forums, both in how they operate, and what the expected outcomes of the meetings can be.
37. NIACE/LSDA research highlighted that the forum process allows 'Groups to raise issues for providers to address, rather than suggesting immediate solutions themselves'. Focus groups tend to centre on a specific issue, and are facilitated discussions providing structured feedback against specific areas. The pilot programme attempted to merge both strategies, with little success.
38. As such, the process of operating an open forum or unstructured forum will generate feedback to NC-ELWa, but is unlikely to address issues where action can be taken in the short-medium term. The forum process in general, has more in common with setting the agenda for future research, rather than providing feedback which strategy can be developed out of.

Conclusions and Recommendations

39. It is apparent that operating a network of learners' forums would provide a mechanism, which would allow learners to engage in the debate about the development of learning policy. However, evidence from the pilot suggests that there are issues with bringing together a regionally representative group of learners and generating information that can be analysed and presented to policy development teams, which would give any meaningful guide as to the priorities for action.
40. York Consulting present two options for the future of consulting with learners face to face to inform NC-ELWa's strategy development.

Option One

41. Several stakeholders commented on the need to develop forums at the organisational level. Forums may be more effective if operated at provider level, as they could generate a sense of collective 'ownership' for the participants. Operation of the forums could be tied into the provider review process, as a means to generating learner feedback on the provider.

42. If forums were operated at this level, the issue with transport and additional time are not so marked as the learners are already travelling to the establishment and are likely to be in the vicinity when the forum is run. Some incentive for attending may need to be considered.
43. Whilst operating at provider level may generate some problems with the provider involvement and therefore the sense that learners can talk freely, this can be alleviated by allowing trained learners to lead the sessions and removing the provider from any involvement in the discussion.
44. There is clearly an understanding that the feedback from the forums is of value to both NC-ELWa and providers/CCETs at the local level. To report this information, a formalised reporting structure would need to be agreed analysing the responses under key themes, and understanding whether the issues were regional or learner group specific.
45. Potentially, the feedback from the forums could be analysed by a central individual, and any specific issues arising could be fostered by the AWALF at the national level. The information could also be presented to NC-ELWa as direct feedback into the planning and policy development process, and to the CCETS and local providers about the issues that affect learners locally.
46. It would be important to establish some guidelines or a best practice guide for providers to set up a forum. Furthermore, to provide an incentive for providers to establish a forum, NC-ELWa could include operation of a forum as a key performance indicator.
47. Funding may be required for the training and development of learners as facilitators, and for establishing the best-practice guide and reporting structure. The primary consideration for NC-ELWa would be that the feedback should be integrated into other mechanisms that report back the findings of the Customer Research Strategy.

Option Two

48. It was identified by a number of stakeholders that the research would be of more use if it addressed a specific issue. This suggests that a more 'purist' research approach would need to be used.
49. NC-ELWa could look at contracting a specialist research agency to carry out a series of national focus groups with learners, looking at specific issues, as with the example of the Scottish Executive consulting on Adult Literacy. Consideration may need to be given to contracting an experienced

researcher to carry out the process. This would generate structured feedback against a particular subject.

Final Comment

50. Both of the recommendations made centre on giving the forums a focus or purpose. This is a move away from the NDC view of what Adult Learners' Forums should achieve. (i.e. allow learners to discuss the issues they want to raise rather than follow an agenda). However, the evidence from the pilot is that for NC-ELWa to be able to take action from learner feedback, it needs to be focused on specific subject areas. Open forums have true value in allowing learners to come together and reflect on their experiences, however, without detailed analysis of the data there is little tangible evidence from which action can be taken. The evidence generated from the forums could provide a platform for further consultation, but cannot be described as a direct feedback mechanism.
51. This is not to say that forums, operated in a 'pure' format, do not have a place in the consultation process, nor that a national network of forums is unachievable. Key changes in approach would be required in the following areas:
- significant re-structuring of the recruitment strategy would be required to promote ownership of the forums by the learners;
 - development and sustainability of the forums would be more likely if the project 'coordinators/managers' could draw on a core group of learners who were already interested in joining the debate on issues which weren't necessarily locally specific;
 - funding would be required to support the development and cohesion of the network, for training and development of learners to lead the facilitation and reporting process, as well as funding for travel and subsistence;
 - the funding would need to be independent of learning provider/policy development agencies to ensure independence and autonomy;
 - structure and guidelines would be required to ensure the forums were adopting a similar approach to consultation;
 - consideration would be required to ensure that younger adult learners were represented in the process;

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- a mechanism for reporting the outcomes and specific actions to carry forward against general policy issues would be required to ensure the forums were meaningful;
 - engagement with those responsible for policy development would be required, e.g. representation on panels;
 - a feedback process to the learners' forums would be required to ensure continued support and commitment.
52. For future consideration, the purpose, role and remit of the forums needs to be established before the consultation process can be of real value to both the learners, and the stakeholders who will be analysing the feedback.

1 INTRODUCTION

- 1.1 This report details the findings of the evaluation of a pilot programme of Adult Learners' Forums (ALFs) operated between December 2001 and February 2003. The pilot was a joint partnership funded by the National Council for Education and Training for Wales (NC-ELWa) and the National Institute of Adult Continuing Education Dysgu Cymru (NDC). The evaluation was carried out by York Consulting between July and October 2003.

Context

- 1.2 NC-ELWa's Market Intelligence Team has recently developed a Customer Research Strategy (CRS) to provide an understanding of learner needs, motivation and satisfaction. The aim is to inform and direct policies, and to guide further product development and marketing communications activity. A secondary aim is to understand what motivates customers to learn, in order to widen and deepen participation in learning and understand what customers think of the education and learning services they receive. Adult Learners' Forums have formed part of this overall activity.
- 1.3 Other activities being undertaken as part of the Customer Research Strategy are:
- a blanket learner satisfaction survey during June 2003, including 20 minute telephone interviews with over 6,000 learners;
 - a provider-driven approach to the learner satisfaction survey in future years, which will feed into the provider assessment activity within the Quality Assurance Framework;
 - establishment of an individuals panel and an employers panel in order to track changes in attitudes to and participation in learning, and;
 - production of a range of themed reports throughout the programme lifetime.

- 1.4 The aim of the project was to test the validity of learners' forums as a way of collecting feedback on the learning services in Wales, mainly those funded by NC-ELWa. The objective of the pilot ALF programme was to establish and manage four learners' forums. One forum would be set up in each of the four Welsh regions, and would operate at Community Consortium for Education and Training (CCET) level. Each would be made up of a core twelve existing adult learners from a range of providers and learning backgrounds. The forums were to meet four times throughout the life of the project and discuss issues agreed by the Steering Group.
- 1.5 For NC-ELWa, the primary aim of the pilots was to explore the needs and views of learners, and assess whether this mechanism would provide a useful tool by which learners' opinions could be fed back to NC-ELWa on a regular basis. Their role was to facilitate and manage the project, as NDC have direct links with learners and providers across Wales.
- 1.6 NDC's motivation for being involved in the pilot programme was slightly different. They represent post-16 learners and regard themselves to be 'the voice of the learners'. From NDC's perspective, the forums were about 'empowering' the learner, and letting them set the agenda.

What are Adult Learners' Forums?

- 1.7 There is a significant amount of activity being undertaken at local and national levels to consult with the 'customer' of post-16 learning. Research carried out by NOPWorld for NC-ELWa as part of the Learner Satisfaction Research, identified that a number of providers throughout Wales are consulting with learners through means such as questionnaires, evaluation sheets and focus groups.
- 1.8 The learner forums were intended to broaden the approach to consultation by funding a mechanism whereby learners could get together and discuss both specific issues, and their own experiences in general. NDC highlighted the benefits of forums in the final report, 'Developing Learners' Forums in Wales',

"Getting together helps to generate a collective and authentic voice on behalf of adult learners. It is a means by which adult learners – from the perspective of experience and reflection – can join in the discussion with professionals, providers and decision makers at a range of levels in a variety of settings."

- 1.9 NDC's vision was that the forums would operate at CCET level in order to capture local and regional variances of experiences of learning. The views and information generated could be presented to both CCETs and providers at a local level; more specific issues could be fostered by the All Wales Adult Learner Forum (AWALF) set up as part of the project, and be represented in discussions with policy makers and those responsible for funding learning nationally.
- 1.10 NC-ELWa recognise the importance of listening to learners, and agreed to fund the pilot programme in order to establish how effective Adult Learners' Forums could be as a method of on-going consultation. It was also regarded as an opportunity to tie the then emerging CCETs into the Customer Research Strategy. If successful, the forums could be used to develop an evidence base for policy development, and increase direct engagement with learners. Additional benefits were that NC-ELWa would have access to NDC's existing network of learners who were willing to take part; potentially, a longer-term benefit of tracking learners and the effect of policy change could be achieved.

The Evaluation

- 1.11 York Consulting were contracted to carry out the evaluation of the pilot project in July 2003. The evaluation was not intended to analyse the information generated by the learners' forums. The primary aim was to evaluate the effectiveness of the Adult Learners' Forums as a mechanism to obtain and feedback the views of learners to the National Council-ELWa. This includes:
- how the forums were run;
 - the type and range of views obtained;
 - how these views were reported back to NC-ELWa;
 - the extent of use by NC-ELWa and the attempt to integrate these views into policy or operations;
 - exploring how the forums could be improved or changed.
- 1.12 The key activities involved in carrying out the evaluation were:
- a literature review of other research undertaken throughout the United Kingdom on learners' forums;

- interviews with the learners who participated in the learners' forums;
- interviews with key stakeholders including:
 - (i) the commissioner of the research;
 - (ii) the manager of the research;
- NC-ELWa personnel responsible for policy development and provider management;
- NIACE Dysgu Cymru personnel;
- interviews with facilitators of the forums;
- analysis and reporting.

1.13 This report details the findings of the evaluation and is structured as follows:

- **Section 2** explores how the forums were set up and managed;
- **Section 3** reports on how the forums operated in practice;
- **Section 4** examines the issues which arose in implementing the forums from the perspective of the facilitators and the learners involved;
- **Section 5** looks at the analysis and reporting from the forums;
- **Section 6** looks at how the research has been or will be used from the perspective of stakeholders;
- **Section 7** looks at other examples of learners' forums in operation;
- **Section 8** presents the conclusions and recommendations.

2 SET UP AND MANAGEMENT

2.1 This section explores the origin of the project and how it was structured. This is covered under the following headings:

- Early Stages;
- Costing/Funding;
- Operational Management;
- NC-ELWa Management;
- Steering Group;
- Forum Selection;
- Facilitator Role;
- Recruitment of Learners;
- Framework/Programme for Learners' Forum Meetings;
- Dissemination Event;
- Reporting;
- Conclusions.

Early Stages

2.2 The Acting Director of NDC approached the Future Skills Wales Manager at NC-ELWa in July 2001 to discuss the potential for setting up a network of learners' forums. NIACE in England had been involved in some activity with developing learners' forums at the local level. NDC wanted to take the core principles of engaging with learners and extend this to set up a national network of forums in Wales.

2.3 NDC set out the key principles behind the forums in their proposal to NC-ELWa. The aim was to, "encourage the vigorous involvement of adults in the shaping of their learning lives, within all forms of Adult Learning."

2.4 The philosophy was that the forums should be about empowering the learners, recognising they have a valuable voice in the debate on the development of learning services. They wanted to generate a network of forums, which would allow learners to come together and talk over their experiences, give each other mutual support and "identify causes for celebration or concern that would benefit from some collective attention".

2.5 NC-ELWa agreed with the principle in theory, but proposed a more structured framework whereby the learners would discuss specific issues, from the perspective of their own experiences. This would generate feedback and directly inform NC-ELWa and other stakeholders in other learning settings about a range of issues that impact on policy development. This would foster the core concept of learner empowerment, as there would be a direct channel for their voice.

2.6 It was agreed that the NC-ELWa approach would be adopted, but that learners would be encouraged to talk freely about other experiences, which they considered important to discuss. The agreed objectives were:

- to enable adult learners to be involved in discussions about their own education and to contribute to decision making processes related to the education of adults;
- to develop a working model for a Learners' Forum in each ELWa region;
- to develop a national network of Learners' Forums;
- to engage learners in the process of feedback on the learning experience; and in the promotion, development and evaluation of lifelong learning strategies.

2.7 At the proposal stage of the project, the Future Skills Wales Manager identified the benefits over and above that of a focus group.

"..Individuals, over their time on the Forum become more informed about the issues around the working of the learning infrastructure and can become an 'informed lay-person'. There are also spin off benefits of enhancing their skills through involvement in such a group and ELWa empowering individual customers to inform it's planning."

2.8 It was further commented at this time,

"Some more thought needs to be given as to how they will function, and crucially, using the advice that comes from them. Key individuals and teams throughout the organisation (NC-ELWa) will need to be signed up to the idea."

2.9 Four pilot forums were to be set up based at CCET area level, representing each of the four Welsh regions and comprising a balanced geographical mix. **Table 2.1** highlights the key agreed actions to carry out in setting up the forums.

Table 2.1
Key Actions to Establish Learners' Forums

- identify interested CCETs who wish to participate;
- establish a Steering Group made up of members from the AWALF, NC-ELWa and NDC;
- carry out a mapping exercise of the training organisations in the areas selected;
- hold stakeholder meetings to advise the providers in the local areas;
- ask learning organisations to recommend learners outlining their selection process;
- develop a role and remit for the forum and invite agenda items for each meeting;
- develop links with CCETs to encourage participation in the decision making process by referring learners to become members.

Costing/Funding

2.10 NDC presented a costing to NC-ELWa to fund the operation of four pilot projects. The breakdown is shown in **Table 2.2**.

2.11 Further options were also presented to support the project. These are presented in **Table 2.3**.

Table 2.2
Costs for Operation of ALFs

Co-ordinator	£16,566
Clerical support	£5,212
Travel and subsistence for co-ordinator	£2,800
Project Management	£2,867
Consumables	£716
Total	£28,161

Website development	£750
Newsletter and distribution	£1,250
Dissemination event	£1,500
Booklets and distribution	£1,250
Meetings at local venues	Free
Travel and subsistence – learners	£960
Travel and subsistence – facilitators	£600
Training - facilitators	£1,600

2.12 NC-ELWa agreed to provide funding to the value of £20,000. The contract made provision for the following services;

- “..establish an All Wales Adult Learners’ Forum and a network of four pilot Local Adult Learners’ Forums, one in each ELWa region”;
- “...establish a working dialogue with ELWa Regional Offices, Community Consortia for Education and Training, Education Authorities and all Providers of Adult Learning”;
- “...identify the strengths and weaknesses of the provision of adult learning within Wales and, in conjunction with ELWa and the Steering Group, develop protocols for enabling learners to contribute to decision-making processes related to adult education/learning”;
- “...complete an evaluation report of the pilot year to inform ELWa’s planning process for the 2003/2004 financial year”.

2.13 NDC had already established the All Wales Adult Learners’ Forum

2.14 Payment was to be made on successfully reaching the following milestones:

- £5,000 - completion of desk research to inform the critical path analysis, operational plan, project evaluation framework and key performance indicators;
- £5,000 – establishment of a Project Steering Group, selection of pilot areas and meetings with stakeholders;
- £5,000 – completion of mapping exercise to establish providers and learning opportunities in the four pilot areas;

- £5,000 – recruitment of learners and establishment of a Learners' Forum in each pilot area.

2.15 It was loosely recognised that the NC-ELWa funding allowed £5,000 for each forum. However, following receipt of the bids it was agreed that five forums would be funded. Two good quality bids with different geographical and economic profiles were received from the South East, which would allow for further comparison. An additional £2,764 was granted to fund this. Less money was granted than for the others in recognition of the economies of scale that had been gained.

2.16 The main body of NC-ELWa funding was used to pay the salary of the Project Officer responsible for the set up and management of the forums. No monies were allocated to pay the facilitators or the learners to attend the forums, or for travel and subsistence. This was raised as a potential issue by NDC at the time the contract was agreed, and was to be revisited with NC-ELWa when the forums were operational.

2.17 The remaining costs were funded from NDC's core budget.

Operational Management

2.18 NC-ELWa and NDC agreed that to support the development of the project, it would be necessary to draw up some key project management documents. These were comprised of:

- a critical path analysis;
- an operational plan;
- a set of key performance indicators; and
- an evaluation framework.

2.19 The critical path analysis established the activities and timetable for the project. The key phases involved for delivering the project are set out in **Table 2.4**. The activities were supported by five Steering Group meetings at key intervals in each phase.

Table 2.4 Project Timetable		
Phase	Time	Activity
Phase 1	Mar-Apr 02	Establish Steering Group, select pilot areas
Phase 2	May-Jul 02	Develop links with CCETs, meet stakeholders, establish forums
Phase 3	Aug-Dec 02	Learner forum meetings
Phase 4	Jan-Feb 03	Final meetings, evaluation, dissemination event

2.20 The targets that were established in the operational plan fed directly into the evaluation framework and were in line with the milestones set for payment of the funding. The outcomes/targets established were:

- establishing a Steering Group;
- selection of pilot areas;
- mapping exercises (of training providers in the areas selected);
- stakeholder meetings in each pilot area;
- recruitment of learners;
- establishing the learners' forum in each pilot area;
- developing links with CCETs;
- website development;
- schedule of learners' forum meetings;
- dissemination event;
- planning and progression.

2.21 Whilst these documents provided clear objectives for the Project Officer, they did not establish what the outcomes of the project would be. From the outset, the activities that were required to take place were clearly established. However, there was no formalised expectation of what would be achieved as a result of the forums' operation. The fact that it was possible to set up and operate the forums does not justify their existence if they do not have any influence in the form of a collective voice.

2.22 This was a pilot project intended to test how effective learners' forums would be for helping NC-ELWa understand the motivations and needs of learners. From NDC's perspective, the project was about empowering the learners by giving them a role in the policy discussion. However, without a formalised feedback mechanism into the policy arenas, it is unclear how the information was intended to be used beyond reporting to the Steering Group. This was potentially a 'missing cog' from the system.

NC-ELWa Management

- 2.23 As mentioned earlier in this report, the project was set up in the early stages of NC-ELWa's development of the Customer Research Strategy. The Future Skills Wales Manager led the initial negotiations about the contract and purpose of the pilot project.
- 2.24 Project management in the early stages (to July 2002) was the responsibility of the Head of Marketing and Participation. The Marketing Executive involved in the project, the Head of Marketing and Participation and the manager responsible for Adult and Community Education (ACE) attended Steering Group meetings.
- 2.25 Project Management was later handed over to a Customer and Market Analyst, as part of responsibilities for managing the broader Customer Research Strategy. It was at this point that it was agreed an evaluation of the project would be required in order to make future decisions about the shape of such activity.

Steering Group

- 2.26 The Steering Group was established early in the life of the project and was scheduled to meet five times throughout the project. Their remit was as follows:
- to give **support and direction** to the development of a national network of learners' forum across Wales;
 - to **receive reports on monitoring, evaluation and progress** from the Project Officer, benchmark according to the evaluation framework and critical path analysis;
 - work with the project co-ordinator to further **develop the critical path analysis**. To provide advice, direction and support through each stage of the project;
 - to **discuss feedback from each forum meeting** and create an understanding of what motivates individuals to learn and their aspirations of learning;

- to **formulate this discussion into recommendations** to NC-ELWa regarding the promotion development and evaluation of Lifelong Learning strategies;
- collectively, to **facilitate a reporting process to NC-ELWa** and the National Assembly with the aim of addressing the needs of learners from all backgrounds and contexts across the whole of Wales;
- to **bridge the gap between learners and those responsible for the delivery of learning services** by understanding their needs and integrate learning with the appropriate provision;
- to **agree on the way forward** at the end of the pilot project and the feasibility of sustaining the network of forums afterwards;
- to **agree the frequency and location of meeting.**

2.27 The Steering Group was made up of fifteen representatives from the AWALF, NDC, NC-ELWa, and the CCETs. Representatives from all bodies were in attendance throughout the life of the project. The Steering Group met five times throughout the life project and was well attended on each occasion by representatives from each of the organisations mentioned above.

Forum Selection

2.28 NDC wrote to the chairs of the twenty-one CCETs in Wales in December 2001 inviting them to express interest to be involved in the project. An application form was then sent to the interested CCETS, and fifteen bids were returned. The application form asked the CCET representative to answer the following questions.

Figure 2.1 Questions asked on CCET application form
Describe the demographic make up of your area.
Provide an overview of the operation of your CCET.
What would you consider to be the advantages of hosting this pilot project in your area?
Has your CCET established mechanisms to enable feedback from learners to have a real impact on the quality of future provision?
What examples are there currently of learner involvement with CCET partners?

2.29 The responses were rated on each of the five questions and given a score out of twenty-five. A high number of quality responses were received from South East Wales and it was proposed to the Steering Group that two be selected from this region. The additional forum to be selected differed in its' economic and geographic make up, and would be of additional interest as it would allow comparison within one region.

2.30 The profile of the five CCET areas selected are shown in **Table 2.5**.

Table 2.5 Profile of CCET Areas Selected		
Region	CCET Area	Area Classification
North Wales	Dolen Dysg Dinbych	Rural/Coastal
Mid Wales	Powys	Rural
South East Wales	Torfaen	Urban
South East Wales	Bridgend	Industrial
South West Wales	Pembrokeshire	Rural/Coastal

2.31 Following the selection of the CCETs, a mapping exercise was carried out to establish which providers operated in each area. All stakeholders (providers, CCET representatives etc.) were then invited to a presentation at their CCET. The aim of these events was to raise awareness of the project, gain commitment, agree hosting arrangements, secure learner representation and develop links with the local CCETs.

Facilitator Role

2.32 Each CCET recommended a facilitator for the project. Their role was to act as a local support person, by recruiting learners, setting up the learners' forums meetings and arranging the hosting of the meetings with local providers. The facilitators were also to report on the outcomes of the meetings at the project Steering Group meetings.

2.33 No funding was allocated for either the training and development of local facilitators, or their travel, subsistence and involvement with the project in general. NDC were concerned about how this would impact on the management of the forums at the local level. The quality of information generated would be dependant on the facilitators putting time and effort into setting up the forums, recruiting a true cross section of learners, and reporting back the findings. NDC highlighted this as an area of risk to the successful operation of the project.

2.34 In an attempt to ensure the forums were sustained and a close relationship was developed between the facilitator and the Project Officer, it was agreed that the Project Officer would attend each meeting to assist with the facilitation.

Recruitment of learners

2.35 Facilitators received a list of learning sectors, made up of a range of local providers, from which learners were to be recruited. It was intended that each forum would be made up of a cross section of learners from different backgrounds. This would allow for comparison of learning experiences within a particular profile across the country, and also allow learning experiences to be discussed amongst different groups of learners within one area. Facilitators could then use their knowledge and links with the providers to create a robust learners' forum.

2.36 Twelve learners were to be secured for each forum and it was intended that the same learners would attend each of the four meetings. This would allow for comparison of learner views over the life of the project and provide a longitudinal aspect to the project. The learners were not allocated any money for travel and subsistence to attend the meetings.

Framework/Programme for Learners' Forum Meetings

2.37 NC-ELWa suggested a framework of issues to address in the meetings to ensure some consistency in themes being discussed. This was agreed by the Steering Group. The framework suggested was:

- **Meeting One** – why learning, why subject, motivation and aspirations, fears and concerns, advice and guidance received, enrolment process and early views;
- **Meeting Two** – thoughts on provision and learning environment, good experiences, poor experiences, issues affecting fulfilment of aspirations, potential;
- **Meeting Three** – continuation of above – have things changed since previous meeting, review comments from previous meeting;

- **Meeting Four** – review of learning experience, plans for the future, recruit leavers from the group for population panel or longitudinal study, review content of group – willingness to continue if studies continuing.

2.38 It was expected that whilst each forum would have a specific theme, learners would also be given the opportunity to report their experiences of other issues about learning. This was to ensure learners could portray what they thought was important about learners' motivations and needs, rather than the issues the Steering Group had agreed.

Dissemination Event

2.39 To ensure the findings of the project were fed back to the interested parties involved in the project (i.e. representatives from the CCETs, providers, learners etc.) it was agreed that a dissemination event would be held.

2.40 The Steering Group met in January 2003 to discuss the purpose of the event and it was agreed that it would:

- **disseminate the findings** of the pilot work to all interested parties;
- show that the joint aim of the project was to **facilitate a consultation process** with learners from a cross-section of backgrounds and learning contexts, so that learners could talk about their learning experiences through a collective voice;
- give a different perspective of **the value of learners' forums** in Wales by the people it will directly effect;
- to give delegates the opportunity of participating in interactive workshops to determine:
 - how to involve learners/customers in the quality improvement process of learning services in Wales;
 - how to develop a code of practice:
 - a. as service providers to respond to the needs of learners; and
 - b. for learners to express their needs to providers.

2.41 The dissemination event was well attended by representatives from all partners who have a vested interest in learning and provision across Wales. Speeches were delivered by some of the learners involved, as well as those involved in the delivery and management of the project. The focus of the dissemination event was on reporting the experiences and issues that had been raised by individual learners, rather than developing an action plan following analysis of the findings.

Reporting

2.42 The contract made provision for progress reports throughout the life of the project, and an evaluation report at the end identifying issues for further consideration and highlighting good practice.

2.43 Facilitators, where possible, would report the findings of the forums to the Steering Group.

Conclusions

Management

2.44 There was a clear partnership arrangement to set up and deliver the project, with clear structures and processes to manage its development. Both parties agreed that the learner should have a recognised voice within the debate on policy development, and that the forums could offer a collective learners' voice.

2.45 Due consideration was given to a number of factors which could impact on the successful outcome of the project, such as the role of the facilitators, the responsibility of the Steering Group and recruitment and engagement of learners. However, although discussed, it was not possible to secure funding for these elements once the project was established.

2.46 Operationally, there were clear objectives for the Project Officer to fulfil which would determine the successful delivery of the project, and a mechanism was in place (the Steering Group) to discuss potential problems should they arise.

Purpose

- 2.47 There is evidence that from the outset, the partnership struggled to agree on the clear purpose of the pilot. For NDC, the project was about setting up a network of forums that would regularly meet to discuss the issues that affected their learning experiences. It was intended to be an evolutionary process where the learners would have the opportunity to identify the issues that impact on their learning experiences.
- 2.48 For NC-ELWa, whilst it was recognised that this was about empowering the learners, the focus was about generating feedback against a framework of issues that could be used as an evidence base for policy decisions. This was a research project to test how effective this method could be.

Feedback

- 2.49 Despite the disagreement about the aim of the project, for both parties, the central outcome for success had to be that the feedback from the learners' forum was used. This could be through further discussion at the AWALF where issues could be fostered and presented to panels of policy makers; or by being fed directly into CCETs, local providers, regional NC-ELWa offices or policy teams nationally.
- 2.50 However, it appears that this core element of the project was missing on both sides. The focus of the debate was on how the forums would be established and managed in operation. Mention was made at various stages (set up, in the contract and in the Steering Group remit), that consideration must be given for how the information was going to be used. However, there was no formal agreement on who would be the audience for the information outside of the Steering Group.
- 2.51 As a result, little consideration was given to how the feedback would be recorded or reported. A fundamental issue when setting up a consultation process is how the information is recorded. Focus groups are often recorded and transcribed or detailed notes are taken, whereas forums tend not to be recorded but produce an action plan as an outcome. Neither of these approaches were discussed or properly adopted, and there was no expectation of how the information would be reported back.

3 OPERATION OF THE FORUMS

- 3.1 **Section 2** established the methodology for setting up and managing the forums. In this section the operation of the forums is explored.
- 3.2 Five CCET areas were selected to operate an adult learners' forum. It was intended that four meetings would be held in each area between July and December 2002. The meetings were to be organised and set up by a local representative, but supported by the Project Officer facilitating the discussion. Each meeting was to last no more than two hours. Neither the facilitator nor the learners were paid for their involvement and the learners were not provided with funding for travel and subsistence.
- 3.3 Four of the five CCET facilitators experienced initial problems securing learner and provider involvement due to the timing of this part of the project. Many of the learning providers were about to start the summer holidays and did not think it was appropriate to select learners at this time. A Steering Group meeting on 30th July 2002 agreed that it was practical to delay the initial meetings until September/October 2002.
- 3.4 The discussions from the forums were reported back to the Steering Group, presented at the dissemination event, and published in the report, 'Developing Learners' Forums in Wales'. For the evaluation, the report has been used for understanding what was discussed in the forums, as this was the main mechanism for disseminating the findings to stakeholders within NC-ELWa.
- 3.5 Each of the forums is discussed in turn below, highlighting their key characteristics and issues faced.

Dolen Dysg Dinbych

- 3.6 The facilitator for the Dolen Dysg Dinbych forum was Dilys Hughes, a Secondary Education Officer. The first meeting was held at the Caledfryn, Denbigh. Subsequent meetings were held at Pilkington High School. Four meetings were held between October 2002 and January 2003.

- 3.7 Concerns were raised by the CCET co-ordinator that due to the forum's location in the north of the county, the full range of issues affecting learners would not be reflected. A natural divide in the county means that the north and south are geographically quite different (the south is very rural), and the comments from the meetings would only represent the more urbanised north. The facilitator felt that, in terms of the representation of the whole county, it would be beneficial to balance this. Consequently, the Project Officer visited ACE classes in the south to generate additional feedback.
- 3.8 The meetings were well attended but not by the same, consistent group of learners. In total, twenty-six people's views were reported. As such, the views were not necessarily part of an evolutionary discussion. The process had more in common with one off focus groups.
- 3.9 A further issue with the findings is that whilst those who attended the meetings were profiled in the report, the comments made are not put into the context of whom they were made by. This makes the evidence difficult to analyse in terms of where the priorities for action are, and by which types of learner or provider.
- 3.10 In summary, whilst the facilitator was able to engage groups of learners in discussion, it is not possible to say whether the information gathered was any more useful than if questionnaires had been sent to the group. The feedback notes that the learners enjoyed the meetings and felt that participating in the project was a valuable learning experience. However, the information is difficult to analyse to target any specific learner group or issue.

Powys

- 3.11 A Community Development Officer was appointed as the facilitator for the learners' forums in Powys. The first meeting was held in October 2002 in Builth Wells. Five learners attended the initial meeting and the difficulty of operating a forum in Mid Wales was discussed. It was agreed that it would be unlikely that a representative group of learners from across the county could be secured after the first meeting to address the issues outlined in the framework.

3.12 In order to consult with learners across the county, questionnaires were used (see annex 1) covering the breadth of issues covered in the framework for the four learners' forum meetings. Further meetings were held in other locations with different learners across Powys, however it was not possible to cover the framework of issues within the agreed methodology.

3.13 The sheer geographical size and rural nature of the area made it impossible to fulfil the objective of developing a learners' forum regularly attended by a core group of learners. In addition, the report highlights the problems faced by the facilitator in terms of the extra workload that organising the forums generated.

"It was impossible to devote enough extra resources to the responsibility of the project work in terms of time, logistics and extra workload; this had obviously affected the outcome."

3.14 The report does provide feedback from learners on the framework of questions; however, the bulk of this information is from the questionnaires. As such it is questionable how this can be used to evaluate the effectiveness of the learners' forums, as it was mainly generated by questionnaires.

Torfaen

3.15 The Director of the Beth Johnson Foundation for Intergenerational Practice facilitated the Torfaen Learners' Forum. All four meetings were held in the local youth centre. In total, seventeen learners attended the forum although attendance declined in the latter sessions.

3.16 The profile of those attending was recorded, but the comments were not attributed to specific learner profiles. Whilst it was important to guarantee anonymity in the discussions, the comments need to be analysed and interpreted in context. Seventeen people attended the meetings, but the numbers declined over the duration of the project; therefore the mix of those at each meeting was likely to be quite different. From the report, it was not possible to make a distinction between who said what.

3.17 The CCET co-ordinator raised concerns about the level of learner drop out from the forums. A telephone survey was undertaken with the learners to understand the reasons for drop out. In general, generic reasons for non-attendance at meetings were cited by individual learners such as timing of the meetings, transport costs, childcare etc.

Bridgend

- 3.18 The Bridgend Forum was facilitated by the Development Officer for the Bridgend Association of Voluntary Organisations (BARVO) and the Adult Education Officer of Education, Leisure and Community Services. Four meetings were held at the BARVO office.
- 3.19 All four meetings were held but there was generally poor attendance, usually an average of seven people with ten in total over the four weeks. Again, there are issues with the how the feedback was reported because the comments were not made against a particular profile of learner. Furthermore, the issue of non-attendance raises concerns about how representative the comments are of learners in general.

Pembrokeshire

- 3.20 The Project Officer had difficulties making links with the local facilitator and securing participation in the project in a similar format to the other forums. The Learning Services Manager at Pembrokeshire College was the facilitator for Pembrokeshire, and thought it would be more practical to tap into an established forum, which had been operating within the college for two years.
- 3.21 The forum was representative of all course groups across the college and its outreach centres, and covered the range of sectors identified for the project. It had been identified as an example of outstanding practice for the region in consulting with learners, and the Project Officer and the Project Manager agreed to use the minutes from the meetings to identify the issues agreed in the framework.
- 3.22 Concerns were raised about the likely difference in format of the forums, the range of learners attending, and whether they would be happy to have their comments and profiles reported. However, these were not regarded as significant problems. The Project Officer did not attend these meetings as there were communication problems with the local facilitator.
- 3.23 NDC later identified problems in obtaining the feedback from the forum. As the Project Officer did not have a direct role in the facilitation of the forum, the relationship with the local facilitator did not develop as well as in other areas. No information was gathered on the profile of the learners; the minutes were sent to the Steering Group towards the end of the project.

Issues with Forum Operation

3.24 There were clear difficulties with the set up and operation of each of the forums. **Table 3.1** sets out the issues experienced by each. Forums did operate in each of the five areas although for two (Pembrokeshire and Powys), this was not in line with the methodology agreed. This is not a problem in itself as the Steering Group agreed this, but it does highlight that there are clear issues which need to be considered in assessing whether forums could be sustainable in the future. These could be categorised as:

- facilitator commitment;
- attendance;
- representation;
- reporting.

Facilitator Commitment

3.25 One of the primary considerations for the successful outcome of the project is that the facilitator must have the time and inclination to ensure the forums are established as they were intended. This involves finding a suitable time and location to hold them, being able to recruit and retain a representative group of learners and ensuring that the learners understand what the purpose and outcome of the forums will be. They are the central contact with the learners and are therefore responsible for engaging them in the process.

3.26 In this pilot, the facilitators were paid for their travel and expenses, but all other involvement was part of the overall duties in their existing job. This has implications for the priority this was given, and therefore, how likely the pilot was to succeed.

3.27 Furthermore, the facilitators were not given responsibility for hosting the meetings, as there was no funding for training and development. This would be a key consideration if the pilot were rolled out nationally, as it would be unfeasible for one person to attend all twenty-one meetings.

Table 3. 1
Operation of ALFs

	Dolen Dysg Dinbych	Powys	Torfaen	Bridgend	Pembrokeshire
Region	North Wales	Mid Wales	South East Wales	South East Wales	South West Wales
Profile	Coastal/Rural	Rural	Urban	Industrial	Coastal/Rural
Facilitator	Secondary Education Officer (N)	Community Development Officer	Director of the Beth Johnson Foundation for Intergenerational Practice	Development Officer for Bridgend Association of Voluntary Organisations (BARVO)	Learning Services Manager at Pembrokeshire College
Where Held	Pilkington High School	Various locations county wide	Local Youth Centre	Offices at BARVO	Pembrokeshire College and out reach centres
How many learners involved	26 (varied each meeting).	Not known	17 (Different learners at different meetings)	10 (Different learners at different meetings)	90
Learner recruitment	No problem recruiting – problems with retention of same group	Highlighted at 1 st meeting that due to the geographical spread of the area, it would be difficult to get learners together in one location. Questionnaire circulated	No problem recruiting – problems with retention of same group	No problem recruiting – problems with retention of same group	Already active Learners' Forum in existence with cross sector of learners
Issues / Points of note	Questionnaires were distributed to learners in the south to gain their input into the project.	Questionnaires distributed to a wide group of learners across the county	Issues with drop out, however - learning network established following the Corus closure – ALF sustained as part of this	Forum was supported locally and is still in existence discussing local issues	Forum continues to operate at college level

3.28 In communication between the Project Officer and the Project Manager, it was identified that commitment from the facilitators was low. This is unsurprising as the main bulk of responsibility was voluntary. This was most marked in the place of the Pembrokeshire forum, because although the facilitator was already operating a forum, there did not appear to be a commitment to engaging with the network of forums, or taking the evidence to the Steering Group.

Attendance

3.29 The issue of attendance was a problem across all forums, except in Pembrokeshire. In Torfaen, the learners were contacted by telephone to find out what the main barriers to attendance were. Mostly generic issues such as travel, childcare and time were cited. These would be difficult to address for all learners, although expenses could be provided for.

3.30 Pembrokeshire did not experience such problems. This may be because the forum was well established and because it was held at the place of learning so may not have required much additional time/expense to attend. This is a key factor when considering the future of such activity.

3.31 The issue of attendance was most evident in Powys where it proved impossible to set up one regularly attended forum in such a vast, rural area. Whether payment for travel/expenses would have made this more feasible is unclear. However, evidence from the other forums (and the evaluation in Torfaen) suggests that personal issues are a significant barrier in organising a regularly attended event.

3.32 The issue of attendance is fundamental when considering whether such a pilot programme could be rolled out nationally. It is fair to say that the project did not have much time/resource to engage learners. However, whether it would be possible to sustain a core group of learners, in order that the debate could evolve over time is not clear. This is the one key feature that differentiates the concept from focus groups and is part of the whole argument for developing a network of representative learners.

Representation

- 3.33 The pilot was intended to bring together a representative group of learners in order that the issues that impact on different learner groups could be fully reflected. However, as attendance at the forums was not consistent it is not clear whether this was achieved.
- 3.34 Furthermore, the forums were expected to generate an evolutionary discussion, and be able to reflect how the same group of learners' views changed over a period of time. The issue of representation is also relevant for the 'evolutionary discussion', as the views of the same people could not consistently be reported.
- 3.35 A further problem is the reporting of learners at each forum. The learners who either attended meetings or answered the questionnaires are profiled for each CCET area for the whole project period, however no comment is made of which learners attended which meetings.

Reporting

- 3.36 One of the key success factors for the forums is that the information and issues generated are understood and used by those receiving the information. A selling point of learners' forums is that the evidence is part of an evolutionary discussion, and allows learners to provide evidence on issues they would not normally have the opportunity to raise.
- 3.37 In reading the feedback in the report, 'Developing Learners' Forums in Wales', it is not clear how the evidence from the questionnaires (Powys) differs to that generated in Torfaen (forum). In effect, it raised the question of whether the debate allowed learners to express their views in a more developed way than if the information had been requested in questionnaires.
- 3.38 Whilst the evidence generated is not the only outcome of the forums, when considering how well these might be attended and what level of 'empowerment' the learners get from being involved, the added value of this process is an important factor to consider for sustainability.

- 3.39 A further key issue to consider is how the feedback is reported. It is important to guarantee anonymity in the discussions, however, it is also vital that the comments can be analysed and interpreted in context. The issues discussed were very generic in nature and for these to have value in interpretation they need to be analysed in some detail. For example, stakeholders would be interested in who said what, in what context, what does it tell us about a particular group of learners, how does this compare to findings in another region, does this have implications for a particular provider/type of provider? The report does not provide this level of analysis – it presents detailed evidence of the findings.
- 3.40 The value of operating the forums is not just about feeding into NC-ELWa's strategy development; it is also about empowering the learner and providing the means for a collective voice. However, the information still needs to be reported to a higher level forum (perhaps the AWALF) for collective action to be taken. The analysis phase is central to how useful this is.
- 3.41 In summary, whilst the forums largely achieved the objectives of establishment and operation (except where the local situation prevented this), they did not fulfil the criteria that was set for them to be regarded as successful. Information was generated for the report, but it is not clear who it was made by and in what context. The views cannot be regarded as representative as it is not possible to make a judgement on which types of learners were feeding back. Finally, the discussions were not part of a 'true' evolutionary process, as different groups of learners attended the meetings over the course of the project.

4 IMPLEMENTATION ISSUES

- 4.1 To further understand the issues that impacted on implementation at the local level, interviews were conducted with the facilitators and a sample of learners. It was intended that twenty learners, (four from each region) and each of the five facilitators would be interviewed.
- 4.2 However, problems were experienced in making contact with the facilitators and accessing the learners' details. Interviews were carried out with the facilitators in Torfaen, Pembrokeshire and Bridgend. Details of the learners were accessed through these people. It was not possible to hold interviews with the facilitators in Dolen Dysg Dinbych or Powys and as such, no interviews with learners in these areas were held. In total, seventeen interviews were held, fourteen from Torfaen, and three from Bridgend. No record was kept of the learners participating in the Pembrokeshire forum.

Key Issues

- 4.3 This section looks at the key issues for operating the forums in practice, specifically attendance, results, outcomes and whether the groups provided a representative sample of learners.
- 4.4 Attendance was an issue for all the forums consulted. The Torfaen forum undertook its own survey into the reasons for non-attendance. The main issues to arise were:
- the **timing of the meetings**: There was no one good time to suit all participants. In the context of the forum's aim to achieve and maintain an intergenerational and inclusive approach, the issue of finding a suitable meeting time was a constant challenge;
 - **attempts were made to vary the meeting times** to maximise the number of participants attending, but there were always going to be some who were unable to make it because of family commitments, such as school nursery collection times, or the travelling time to the meeting;

- **travel and other costs** were also cited as a reason for lack of attendance. The issue of cost to both participants and the forum facilitators was a point raised by all of those interviewed. In the main, facilitators were reimbursed for their travel costs, but not for other expenses, such as the time spent organising the meetings;
- **those with small children and other family commitments** found it particularly hard to attend the meetings. In part because of a lack of child-care facilities at the venues, but also in terms of arranging alternative and appropriate care and support arrangements for the period of the meetings.

4.5 Outcomes from the meetings are difficult to quantify objectively, given that the main benefits expressed by facilitators were in terms of capacity building amongst the groups. Some outputs from the meetings were passed to the AWALF for further discussion, although much of the content may not have had significant generic value, relating instead to local circumstances or a specific provider.

4.6 However, in terms of value gained by individual participants then, results of interviews demonstrated that many of the participants felt empowered by the process of engagement with the forum. Of the learners interviewed, all had continued in or returned to learning across a broad range of programmes - from basic skills to more progressive courses.

4.7 Each of the forum co-ordinators interviewed offered information about the sustainability of the forums, as follows:

- **Bridgend** – the group is continuing to meet regularly and the participants are pro-actively engaged in organising events and support for other learners in their area;
- **Pembrokeshire College** used the learner forum as an opportunity to reinforce the learning experience within the FE sector in that area, which included all of those who access learning from that provider. The meetings will continue as part of the existing college programme;
- **Torfaen** CCET and its partners have, with the support of NC-ELWa, developed the Gwent Learning Network to continue the work initiated through the Adult Learners' Forum. Frameworks and staff are now in place and the programme is about to begin.

Learners' Experiences

4.8 Overall the experience reported by learners was very positive. However, given the diversity and age range involved, some learners had particular concerns:

- it was felt that **some of the younger learners involved were not clear about their role** in the forum, or the expectations made of them once they became involved;
- concerns were expressed by some (again, younger members in particular) that they **did not fully understand the rationale** behind the forums' existence, what would happen to information gathered or why they had been encouraged to become involved. This was perceived as a barrier to participating fully in the discussions;
- at times, the perceived **formality of the forums** prevented younger members from fully expressing themselves and offering their points of view;
- **Pembrokeshire College slotted in the forum meetings amid existing meetings** with the student body;
- **some of the participants saw the process as truly enabling**, and for them the experience has provided a springboard to further engagement in similar discussions on learning, and in some cases has encouraged entry into formal learning.

Perceptions of the Forums

4.9 Both learners and coordinators expressed the feeling that elements of the meetings were constructive whilst for others, part of the process were more of a "talking shop". Some expressed irritation at revisiting the same issues at each meeting. E.g. timing, childcare and other commitments that prevented not just attendance at the meetings but also prevented participants from engaging in learning programmes.

- 4.10 Whilst there was no desire to undervalue such barriers, the learners felt that they were frequently revisited in discussion without clear resolution, or indeed any prospect of resolution. This could be a result of different people attending the meetings over the four groups, or the facilitator not steering the discussion around the framework for each stage.
- 4.11 Those with committee and professional experience generally took on more active roles, and in some cases, it was felt that these members got most out of the meetings.
- 4.12 The overall impression from interviewees is one of generally constructive use of forum time, with each group developing in its own way to suit the needs of the community it has been serving.
- 4.13 There was a mixed response of how the learners' views compared to the facilitators on the usefulness of the forum. For the majority, the learners saw the same picture as the coordinators and many gained the confidence and empowerment to engage further, both in forum activities and learning in general. This was especially true for the older participants.
- 4.14 A number of younger learners, many of whom had been disenfranchised by their recent learning experiences, saw the process very differently. This highlights the need for facilitators to understand their position, their understanding of the ALF process and to adopt a more "young person friendly" approach.

Learners' Ability to Influence

- 4.15 In terms of influencing the real issues, some of those interviewed emphasised the pilot nature of the project and the fact that it was still at a relatively early stage to have a significant impact on policy development. Whilst still at a formative level, discussions dealt mainly with the forum's continuation and progression, rather than the practical removal of barriers to learning. However, there was a perception that these real issues would become a subject for discussion and action as the forums evolved and established stronger identities.

4.16 Of those forums examined, Bridgend and Torfaen attempted to engage with generic policy issues more than Pembrokeshire, which used the forum as a tool for college management facilitation, and could therefore engage in influencing change within that institution.

Facilitators View of the Process

4.17 The coordinators expressed a sense of isolation, beyond the support given by NDC. They felt that the project was viewed with scepticism by their colleagues, and reported that they had to rely heavily on goodwill to establish the pilot forums.

4.18 In addition, there was a sense of impotence, in that whilst the forums allowed learners to express their opinions, the people involved in the process (the facilitators / NDC) had no influence in dealing with the issues raised other than highlighting them to the local providers or CCETs.

4.19 The reasons for this were two fold:

- many of the issues raised were **provider or location specific** and would not have value at a generic level;
- there was **no transparent route for reporting issues** at an aggregated level. It was not felt that the process infrastructure was in place to communicate issues at a higher level. Neither was there any mechanism for feeding back down to the local level.

4.20 However, there was an expectation that these issues would be addressed in due course, as the project developed. It is important that such expectations be managed to avoid feelings of disappointment at a lack of immediate response or change.

Management of the Project

4.21 Facilitators felt that both NC-ELWa and NDC were supportive of the project and therefore its aims. NDC played an active role in the forums themselves, by attending and supporting the coordinators. Facilitators perceived this as both valuable and constructive, but possibly resource intensive in a project where finance was restricted.

4.22 NDC felt this was a necessary role, as the facilitators were not trained in managing focus groups (although, attendance was not possible in Pembrokeshire). Furthermore, the role was part of their other responsibilities and the framework agreed for the project was likely to require more dedicated time than was possible to achieve.

4.23 The issue of cost was a concern to both facilitators and participants. Facilitators were reimbursed their travel but not time, whilst participants engaged voluntarily. There was a perception that management could have been better arranged to compensate those at the forum end of the project.

Sustainability

4.24 The support and commitment shown by the facilitators and the majority of participants suggests that longer-term sustainability could be achieved, subject to some critical changes in the administration and reporting frameworks of the forums.

4.25 It is doubtful that the forums could continue in any sustainable form without an increase, or at least a realignment of the project funding. This became clear to facilitators very early on in the management of the project. It is unlikely that a wide cross section of regular participants could be maintained without the introduction of paid expenses as a minimum. Incentives could also be considered as a means of encouraging learners beyond the professional classes to provide a full and regular contribution to the forums.

4.26 There would also need to be an increase in clarity of purpose to all participants and a more transparent reporting framework, with two way communication conveying learners' views and also reporting back on the effectiveness of the forums at policy level.

4.27 Managing forums in the future would need to reflect the diverse range of characteristics of each learning community, and to respond to the changing nature of such communities. This would help to ensure that the broadest possible cross-section of learners could be engaged and retained over the medium to long term.

4.28 A more rigid programme of themed forum discussions would help to avoid the reported repetition of discussion and to take the subject matter beyond issues relating to individual learning providers or local arrangements for learning. This might also come about if the forums were to be utilised as part of National Council's Customer Research Strategy as a learner panel – to test opinion on aspects of policy or delivery. However, the benefits of this need to be weighed carefully against the alternatives of the existing customer satisfaction survey and the use of strictly moderated learner focus groups.

4.29 Nevertheless, the three forums examined have been able to develop their own respective means of sustaining the group since the end of the project. These have more in common with learner discussion groups, however, there is a clear commitment from the facilitator and participants to sustain the life of the group. Adult Learners' Forums have the potential to achieve a number of benefits:

- they could be the **source of primary level information** on need, inputting into policy development and evaluation;
- they could be **agents for real and effective long-term change** in learning;
- they could serve to **empower local groups of learners**, through providing a voice for individual learners;
- they could be **developed to act as mentors** for other individuals and groups of learners.

4.30 However, in order to achieve this over a period of time, they need to be developed to take on board some of the management and funding issues described above.

5 ANALYSIS AND REPORTING

- 5.1 One of the key issues in evaluating how effective the Adult Learners' Forum pilot was at informing NC-ELWa of the needs and views of learners is understanding how the feedback was reported back to the stakeholders.
- 5.2 The findings have been disseminated in a number of ways:
- presentations to the Steering Group by the facilitators or Project Officer;
 - at the dissemination event in February 2003;
 - in the final report published in August 2003.

The Final Report

- 5.3 The purpose of the final report was to give an overview of the operation of the project, present the findings to stakeholders against the agreed framework and identify what worked well and what issues would need to be addressed for future projects. **This section will focus on the analysis and reporting of the findings.**
- 5.4 It was identified earlier in this report that there was some discrepancy between NC-ELWa's view of the pilot as a research project and NDC's view of it as an 'empowering' exercise. Neither principle is flawed but it does have implications for how the evidence is recorded and analysed.
- 5.5 If, as NC-ELWa required, the pilot was about testing the forums as a feedback mechanism, the evidence would normally be reported back addressing specific themes, cross-analysed by the various groups (area/learner-group) and presented with recommendations for action.
- 5.6 If however, the forums were about empowering the learner and allowing them to discuss the issues that were pertinent to them, the reporting process would be quite different. They would be more likely to feed back the issues raised, and not provide specific actions.
- 5.7 In operation, the forums tried to meet both approaches, which had implications for the recording and reporting of information.

- 5.8 The report presents the findings from each of the forums by profiling those involved over the four sessions, and providing detailed feedback about the comments made about each area covered in the framework. Whilst the detailed feedback published in the report is very useful, it does present some issues for those interpreting the information.
- 5.9 **Figure 5.2** provides a representation of how the report presents the findings from the different forums on good or bad experiences of learning.
- 5.10 For each forum, the feedback is presented under specific headings, and in the main provides the quotes or statements made at the time. This means that the structure is not particularly user-friendly as it requires the 'reader' to move between individual reports to be able to draw comparisons.
- 5.11 To elicit further understanding of the concerns raised by learners, it is important to understand how issues may differ by, for example, region or learner group. This requires the evidence to be cross-analysed to draw out whether the issues are generic to all, or specific to a particular area or type of learner. This is not possible in the current format.
- 5.12 The forums were reported back to the Project Officer in different styles, resulting in a perceived lack of synthesis between the various reports. This makes it difficult to understand what the priority issues raised in each area were. For the forums to be understood properly, some hierarchy in what was discussed needs to be drawn out so that priorities for action can be made.
- 5.13 A further comment is that because the report focuses on the detailed quotes, there is little reference to what the stakeholders can translate into priorities for action. The analysis would need to present evidence against the themes discussed and weighting of issues, which would generate a result and subsequent action.
- 5.14 In summary, whilst the report provides good evidence of the concerns and issues raised by learners, it is difficult to draw evidence and conclusions that can translate into meaningful action. The current format of reporting leaves the reader with contradictions that cannot be resolved. Some understanding of the learners' overall priorities is required to be able to draw conclusions and recommendations from the evidence. A more formalised reporting structure would be required if the forums were rolled out.

Figure 5.2
Examples of Reporting - Good/Bad Experiences by each Forum

Torfaen

Good Experiences

Overcoming the fears of computing and the achievement of goals, a good teacher makes all the difference, the comforting feeling that there would no bullying at the Youth Centre, the right support through dyslexia to bring about the 'feel good factor' of the enjoyment of learning.

Poor Experiences

Bullying by peers and tutors, deterring the intervention of parental support.

Bridgend

Good Experiences / Poor Experiences

- *"Loved infants and juniors, but found a big difference in comprehensive school, because some teachers just wouldn't turn up and one even locked herself in the store cupboard because someone upset her resulting her ignoring the pupils for the whole of the lesson. This learner wishes she had learnt more at school"*
- The group commented that there are a lot more services on offer in schools now to include careers advice and career sessions. Also that qualifications were not a pre-requisite for leading to employment many years ago that is not the case now. As adult learners this group now feel that they appreciate teachers and tutors more than when they were at school
- This learner didn't like junior schools, especially Maths and Science but really likes the comprehensive school she is attending now and surprisingly is now studying maths at A level and loves Science. She also experienced bullying at Junior schools but has not been the case at comprehensive
- This learner experienced learning difficulties in early school days – "mirror writing" but has improved in later years. Now finds that one of his daughters has the same problem and still experiencing getting help for her - her problems had gone unnoticed at school although I had highlighted the problem with the teacher.

Pembrokeshire

Good experiences

Excellent tutors – quality courses – high standards achieved – confidence building – friendships – fun – enjoyment – community spirit – warm atmosphere – like interests – stimulation – plenty of variety in courses and age of participants – friendly and approachable staff at centres-individual attention and encouraged to progress-Exhibitions-parking (Fishguard)

Poor experiences

Too long downloading information on Learn- Direct courses-sometimes tutors progressing too quickly on language courses-expensive coffee-placed at too high a level-finding centre's phone number.

Figure 5.2
Examples of Reporting - Good/Bad Experiences by each Forum

Powys

Good experiences

WEA learners

Interesting subjects

Tutors are knowledgeable, charismatic, enthusiastic, not arrogant, approachable, good communicators, good at engaging learning with interactive sessions, encouraging, open minded, challenging, punctual, well prepared

Most bad experiences, if any, are to do with finance

Non-WEA learners

Lecturers are excellent, good library, flexibility, peer support, good social environment

New skills, new friends, confidence, vocational learning

Distance learner – encouragement of working in a group, self belief, achievement, all good, tutor excellent

Educating oneself to a higher level, meeting new people, improved job prospects, achieving a lot in a short time

Good teacher

Learning more about computers, questions answered clearly, topics covered well

Poor experiences

Poor tutoring, high drop-out rate, isolation, poor communication and administrative support

Lack of interest by the tutor, failure of tutor to turn up and drop out rate

Exam papers lost, qualification never received – waste of time and effort

Poor tutors, accessing information

Being unable to finish degree course, confrontation with the University over completion of Diploma course

Family commitments

Dolen Dysg Dinbych

Good Experiences

Tutor enthusiastic and knowledgeable about the subject

Treated as an equal

Enabled to take an active part in the learning process

It would be more enjoyable if one was able to chose one's own learning setting, your own targets, no pressure

A sense of achievement when completed

Assessment is preferable to exams

Focus on individual interests

Inspiration/respect from the tutor, friendly with good attitude

Special needs were addressed

Informality/interaction good relationship with the tutor

Poor Experiences

Large groups, teaching methods, time constraints – creating pressure, exams,

Poor support in the workplace for learning time

Constantly changing teaching staff

Too didactic, humiliation, teaching methods not creative

Transport to rural areas

6 RESEARCH USE

6.1 This section of the report concentrates on NC-ELWa's use of the research. This is in the context that the evaluation is addressing the question of whether the Adult Learners' Forums provided a mechanism for obtaining the views and feedback of learners to the National Council-ELWa. Interviews were not carried out with the CCETs or providers to find out how useful they found their involvement to be.

6.2 At the inception stage of the project, the Future Skills Wales Manager identified that it would be important to get the 'buy-in' of various teams within NC-ELWa for the research to be of use.

"Key individuals and teams throughout the organisation (NC-ELWa) will need to be signed up to the idea."

6.3 The final report on the project, "Developing Learners' Forums in Wales", was circulated amongst a wide audience of Managers within Strategy and Learning Development, Provider/Delivery Managers in regional offices and the Marketing Intelligence Team.

6.4 At this point, it should be noted that the report was finalised and disseminated five months after the end of the project. There appears to have been some confusion between NDC and NC-ELWa over the central role of the report as the mechanism for disseminating the findings.

6.5 A sample of stakeholders from each department was selected to comment on the findings and potential uses of the report within the remit of their work. They were asked to make comment on:

- awareness of the research;
- research use;
- impact;
- suggestions for improvement;
- good practice.

6.6 Interviews were carried out with three representatives from the Provider/Delivery Team and three managers within Strategy and Learning Development. In addition the Marketing Executive and the Head of Marketing and Participation who were directly involved in the research were asked about their views on the project.

Awareness of the Research

- 6.7 At the proposal stage of the pilot project, an email was sent out to the directors and heads of the relevant departments within NC-ELWa advising off its operation, inviting input and asking whether it could be passed on to those within their departments who would find it relevant. Further updates were sent to all staff through internal MI updates and in the 'Staff News' sheet.
- 6.8 However, of the individuals interviewed in the fields of strategy development and provider management, there appeared to be little awareness that the project had been in operation. However, interest was expressed in this piece of research and there was a general awareness of the less specific details of the Customer Research Strategy.
- 6.9 Several stakeholders commented that they would have liked to have had some input so that they could have contributed to the issues discussed within the forums. However, one Senior Learning Policy Manager, who was aware of the research (as they were a former representative on the NIACE Dysgu Cymru board) commented,
- "I don't think it's particularly relevant to include participation from other departments at the pilot stage. There's always the potential for conflicts of interest to arise which can 'muddy the water' about what the research is trying to achieve. However, if the forums were to continue, there may be issues which managers such as myself would like the forums to discuss."*
- 6.10 The Senior Learning Policy Manager had not had any input in the design of the project but regarded it to be an innovative piece of research.
- 6.11 In general, whilst there was an interest in the activity once prompted, and a recognition that it provided a valuable route to learners, there doesn't appear to have been much awareness raising or action to gain commitment to the project. This probably has much to do with the time in which it was contracted (pre-CRS) and the uncertainty over its fit with the Customer Research Strategy. However, it does present problems for assessing what impact the results of the learners' forums could have.

Research Use

6.12 Whilst the stakeholders from provider/policy development teams had not generally heard of the research, they were interested in the concept of direct engagement with learners. There was an overall impression that this was a very 'worthy' project and appeared to be innovative in its approach.

6.13 One Provider Delivery Manager commented that current methods for provider assessment does not involve direct engagement with learners.

"Review of performance for providers is against the targets set by ELWa. One of the key problems for reaching targets in my area of work is attracting unemployed people into learning. The forums would allow us to make contact with those in learning and understand what problems they faced in returning to learning, and how these could be addressed for others."

6.14 Other positive comments focused on the importance of bringing learners into the debate on policy development and provider management. In essence, there was wide ranging support for consulting with learners on a face-to-face basis to inform decision-making.

"I don't think that its important that this is not a purist piece of research. There's always going to be a problem of representation and self-selection. The benefit of collating evidence outweighs the purist research issues."

6.15 The stakeholders were asked how or if they would use the research to inform decision-making in the format it was currently presented in. The comments here were less positive.

"I understand that the project is about allowing learners to raise their own issues about learning, however, the experience can only be empowering if there is some direction for it. The comments made were very generic and couldn't be used in isolation. I was very worried by the comment, 'bullying is the norm'. What's the evidence for this?"

"I didn't learn anything new that I didn't already know about learners"

"I appreciate that the concept and process is valuable to learners, but I don't understand how they could practically work and feed into policy without becoming more of an official working party group. Moreover, they are unlikely to attract hard to reach learners as they require a certain level of commitment that is hard to achieve."

6.16 In the main, the stakeholders interviewed tended to appreciate that learners had a role to play in developing policy but did not feel that a significant benefit could be realised from the forums in their current format.

6.17 The main criticism was that the comments could not be analysed in any structured way as a result of the way in which they were reported. However, it was also questioned that even if they were covered under specific themes, as the groups were supposed to be representative of all learners, would there ever be a detailed enough discussion on specific issues that NC-ELWa could pick up on.

"I'm sure that the discussions would be much more valuable if groups of learners from similar learning backgrounds could get together to discuss their experiences. Just having a general discussion may uncover some of the issues, but does it go anywhere to offering a solution."

6.18 One Learning Policy manager commented that,

"there is too much of a conflict between the research interest and learning empowerment; neither aspect is successful."

6.19 It was felt that there is likely to be a more effective means of doing both.

"There needs to be a better arrangement link through to providers so that specific feedback can be made to providers. If the focus is not on learning arrangements but specific issues, the debate needs to be carried out with a different approach."

6.20 The general consensus was that the learners' forums lacked focus in what was discussed and how the information was reported. There was a concern that only the more 'vocal' learners would be involved, and the real issues would not be covered in any depth. The key issue for the stakeholders was that there didn't appear to be a clear purpose to the forums of what they were trying to achieve. For the forums to be of real value to NC-ELWa, they needed to be addressing a specific policy issue or an attributed group of providers. However, this conflicts with NDC's aim of empowering the learner to discuss the issues they feel are relevant.

Impact

6.21 None of the stakeholders questioned were able to see a way in which they would be able to use the evidence in its current format. The Marketing Executive was more positive about how the information could be used. They felt that it offered insight into the types of issues that learners had concerns about, and would be a useful tool for finding evidence for marketing. It was also a useful tool for presenting NC-ELWa to the CCETS.

“ALFs were a good opportunity to make contact with the CCETs and also provided valuable contact with learners. From a marketing perspective, the key benefit was the direct learner feedback to use in marketing campaigns.”

6.22 However, on the harder issue of whether the forums could potentially have an impact and lead into policy development, this does not seem possible with the way in which the feedback was delivered.

6.23 It was discussed whether this would have been different if the findings had been disseminated earlier after the end of the project. This was not regarded to be significant.

Suggestions for Improvement

6.24 Some comments were made about whether this was a field of work that NC-ELWa should be funding. It was suggested that many of the issues raised were provider specific and the debate should be generated and addressed by them. However, most people interviewed felt that direct consultation with learners was valuable; issues with the model were the most important factor in how useful the information would be.

6.25 Various suggestions were made to how these could be improved for future use. These tended to focus on collecting evidence from a group of learners that had some relevance to a particular policy agenda or provider. It was felt that to have some use, either particular providers had to be involved to be able to target the evidence and resulting action, or issues about a specific topic (i.e. basic skills) had to be addressed. It was felt that the generic issues would still be uncovered in this way.

6.26 Other operational suggestions were made about paying the learners' travel and expenses and dedicating paid resource to the operation and reporting of the forums. It was commented that the evidence of Pembrokeshire, where learner attendance wasn't reported to be a problem, could have been because of the sense of 'ownership' that came out of forum operating at provider level.

6.27 The suggestions made can be summarised as follows:

Policy Specific

- A representative database of learners to target when feedback is required – participation could be encouraged through incentives, (which fall in line with Assembly Sponsored Public Body (ASPB) guidelines) and learners may feel more empowered if they were providing feedback on a specific issue;

Provider Specific

- Forums led at provider level by learners; the leaders of the forums meet at CCET level to discuss the issues raised in more depth; allows a more strategic discussion to be presented to NC-ELWa on specific issues.

7 RESEARCH INTO FORUM ACTIVITY

7.1 Focus groups are a well-established mechanism for providing qualitative feedback to commissioners of research. Forums are different in that they allow for an evolutionary discussion to develop over a period of time, generating evidence from people that become more informed about the subject area as they engage in debate.

7.2 This section will:

- look at other research undertaken into consulting with learners;
- examine other examples of forum activity elsewhere in the UK and how they compare to the pilot of the Adult Learners' Forums;
- identify elements of good practice in operating forums;
- identify other methods of consulting with learners.

Research into Operating Focus Groups and Forums

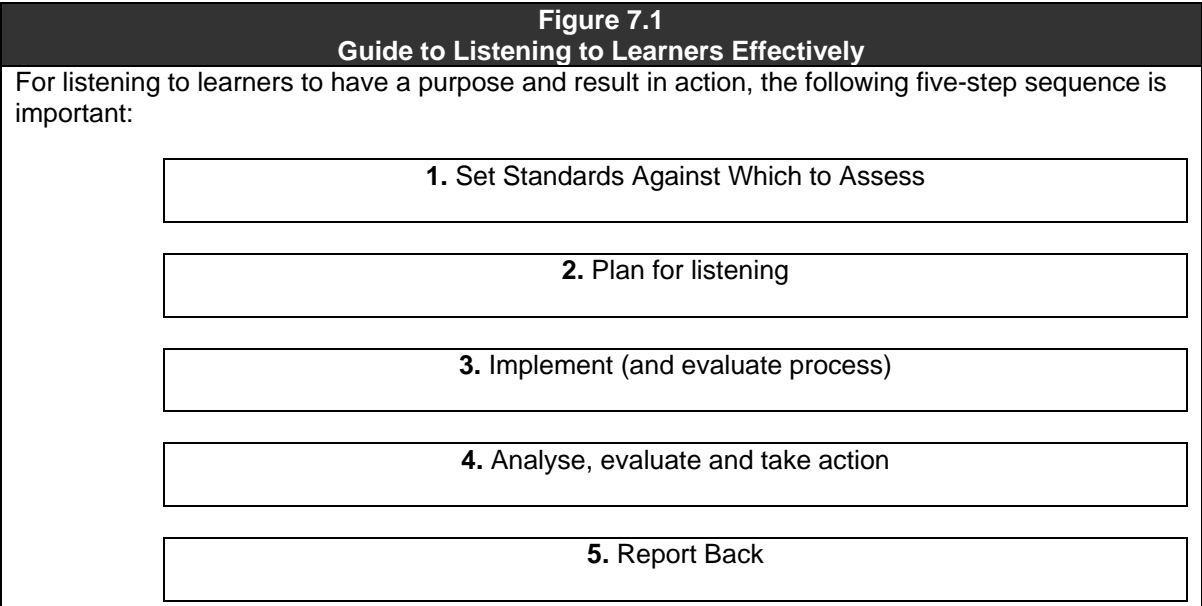
Listening to Learners

7.3 NIACE, in partnership with the Learning and Skills Development Agency (LSDA), are managing a three-year programme to support ACE providers to meet quality requirements of inspection and funding agencies. To support the process, they have carried out research into 'Listening to Learners'¹.

7.4 This piece of research looks at a number of ways in which learners can be consulted to provide feedback to providers and other stakeholders; forums and focus groups are included in the examples. The guide sets out a number of key issues to consider when establishing a process of learner feedback. This is summarised in **Figure 7.1**.

¹ Listening to Learners, Mark Ravenhall, 2001

7.5 A point of note is that the guide places emphasis on the evaluation of both the process itself, and the information generated through the consultation process. It also identifies 'taking action' as an important part of the process. Action does not necessarily have to be immediate, but steps to address the question, 'so what?' need to be put in place, for the consultation process to be meaningful. The Adult Learners' Forum did not complete the full consultation process as set out in this guide.



7.6 The guide also evaluates approaches to consulting with learners; a key factor in what methodology is used, is what the researcher wants to find out. **Figure 7.2** provides guidelines to the contexts in which forums/interest groups and focus groups should be used.

7.7 The focus group is more structured in its approach; the meeting is more likely to have a specific purpose and intended outcome. Focus groups can be repeated with multiple groups, or over a period of time to bring together a wider spectrum of views, but participation of about ten people is regarded as an appropriate number to take part in one event.

7.8 Forums tend to represent a wider group of interested parties within a specific locality. Issues are raised for discussion within the group, rather than being presented with a structured guide. The rationale of the forum is to find out what the representatives consider to be important, rather than discussing a specific topic and providing a solution to a problem.

Figure 7.2	
Approaches and Tools to Consulting with Learners	
Forums and interest groups	
<p>Area and neighbourhood forums involve learners (and others) in a particular location. They may focus on issues wider than the learning community. Membership may be restricted or open to the public. A budget may be devolved to the forum. The agenda may be set in advance or formulated at the time, according to participants concerns.</p> <p>Interest groups or specialist groups are useful for detailed and specific feedback relating to particular aspects of (ACE) provision. This includes regular consultation with existing bodies, including parish councils, professional bodies ,..... and other stakeholders. Groups raise issues for providers to address, rather than suggesting immediate solutions themselves.</p>	
<p style="text-align: center;">Advantages</p> <ul style="list-style-type: none"> ▪ Reach people in their own specific areas and address specific local concerns ▪ Relate to natural communities ▪ Are relatively cheap because groups already exist and have an in-depth knowledge of their own community, including hard-to-reach groups 	<p style="text-align: center;">Disadvantages</p> <ul style="list-style-type: none"> ▪ May involve a significant budget for a small area; it needs careful cost-benefit analysis and commitment to keep the forum going ▪ May not be representative of the community and are unlikely to represent non-users ▪ Involve high costs if the group is specially established by the (ACE) service
Focus groups	
<p>Focus groups explore issues through structured but open-ended discussion by a group of around ten people, representative of a particular sector, led by a trained facilitator. Facilitation is skilled work, requiring either staff training or induction, or the use of external consultants. Some providers train groups of learners to carry out this work.</p> <p>Focus groups can be deliberative: they may learn about, advise and even vote on a particular issue. Some providers have consulted focus groups about the layout of a their brochure, student handbook or prospectus; other to inform the development of a curriculum area such as basic skills provision.</p>	
<p style="text-align: center;">Advantages</p> <ul style="list-style-type: none"> ▪ Are good for issues that need an in-depth, qualitative review ▪ Are useful for generating questions for quantitative analysis ▪ Are effective in assessing reaction to proposed changes; ▪ Avoid just hearing the loudest voices ▪ Assist targeting, as they can focus on sections of the community previously excluded ▪ Allow ideas through group discussion to be built on and new directions taken, rather than following a single individual's view or preset questions. 	<p style="text-align: center;">Disadvantages</p> <ul style="list-style-type: none"> ▪ Cannot be guaranteed to be statistically representative of the whole community ▪ May need to be repeated to cover all target groups or a range of issues ▪ Can be expensive in terms of training or the use of external consultants ▪ Require skilled facilitation

- 7.9 Elements of both the forum and the focus group approach can be seen in the Adult Learners' Forum pilot. The research undertaken by NIACE/LSDA gives clear guidance for what the two approaches can expect to achieve; they are separately defined and have very different outcomes.

Consultative Fora Good Practice Guide for Learning Partnerships

- 7.10 Research was undertaken by York Consulting on behalf of DfEE to support Learning Partnerships² by outlining ideas, key examples and good practice in relation to the implementation of 'learner consultative fora'.
- 7.11 The guide looks at the whole process of consultation (not just focus groups and forums) and details the key stages involved in setting up consultative fora. The Learning Partnership guide differs from the NIACE research as it addresses a wider range of issues to consider than may be relevant to ACE providers/stakeholders. It examines working examples of how strategies have been developed within localities to address a range of issues. An example of this is given later in this section.
- 7.12 The guide identifies six steps to establishing 'learner consultative fora'. These are outlined in **Figure 7.3**. The fundamental message from this process is that clear thought must be given to what the consultation is aiming to achieve, in advance of setting the process up.

² Consultative Fora Good practice Guide for Learning Partnerships, 2000, DfEE.

Figure 7.3 Six steps to establishing learner consultative fora	
1. Purpose	<ul style="list-style-type: none"> ○ Why do you want to consult/involve the learner? ○ Who do you want to consult/involve? ○ What do you expect to happen/change as a result?
2. Mapping	<ul style="list-style-type: none"> ○ Which organisations/partnerships are already consulting? ○ Why and how are they consulting? ○ How effective is it?
3. Approach	<ul style="list-style-type: none"> ○ How can you link with/build on existing activity? ○ In what ways can you consult/involve? <ul style="list-style-type: none"> ▪ formal/informal methods; ▪ participatory methods; ▪ deliberative methods; ▪ electronic methods.
4. Encouraging Participation	<ul style="list-style-type: none"> ○ What's in it for them? Why should they contribute? ○ How do you encourage ownership? ○ Are you consulting/involving a representative group? ○ How do you involve non-learners? ○ How do you interpret and implement change? ○ How do they know the impact, that things have changed?
5. Support and Resource	<ul style="list-style-type: none"> ○ What resources do you need to support your overall strategy? <ul style="list-style-type: none"> ▪ mapping exercise ▪ coordinator ▪ work with partners ▪ establishing links ○ What skills and resources are needed for working with the target group? <ul style="list-style-type: none"> ▪ development officer; ▪ training/skills development for participants ▪ training skills of the 'professionals' ▪ skills of facilitators ▪ activity funds ▪ development funds/grants
6. Monitor and Review	<ul style="list-style-type: none"> ○ What are the process issues? <ul style="list-style-type: none"> ▪ turnover of members/consultees; ▪ representation; ▪ the effectiveness of the mechanism adopted; ▪ perceptions and reflections of target group; ▪ key partners involvement and difficulties. ○ What is the impact and effectiveness? <ul style="list-style-type: none"> ▪ what are the criteria for success? ▪ evidence of success?

Examples of Forum Activity

7.13 There are plenty of examples throughout the UK where organisations have made efforts to engage in consultation with learners through focus groups and forums. A few examples are:

- NIACE in England has made efforts to establish a National Adult Learners' Forum;
- in 2001, the Scottish Executive carried out a consultation process with learners about adult literacy and numeracy in Scotland;
- Walsall Metropolitan Borough Council developed the Walsall Youth Congress to inform the development of the Youth Strategy;
- the Open University Students Association (OUSA) has established a system of representing learners' views at the Regional Forum (one representing Wales).

NIACE

7.14 NIACE in England (separate to NDC) has been involved in a programme of establishing Adult Learners' Forums. However, whilst they have advised learners, providers and other stakeholders on how to operate consultative forums, they have not been involved in coordinating a programme of activity. The operation of forums has been encouraged at the local level and three regional workshops are planned for the end of November 2003 to discuss the issues around consultation and how people are undertaking this type of work. The programme was not intended to be as structured as the pilot programme in Wales. Discussions with staff involved in this research field, articulated that they do not see it as their responsibility to manage such a programme of activity.

Scottish Executive

7.15 In 2001, the Scottish Executive carried out a process of consultation with adult learners to inform the development of the new strategy on adult literacy and numeracy in Scotland. This was carried out by The Learning Experience Trust, in partnership with the WEA Scotland. Thirty-one focus groups were carried out in five Scottish regions. The focus groups lasted about ninety minutes each; the discussions were taped and transcribed. The findings were then analysed by experienced qualitative researchers, and reported back in the document, 'Listening to Learners: Consultation with Learners about Adult Literacy Education in Scotland'. The report identifies both commonalities and differences between regions, types of provider and types of learner.

Learning Partnership Case Study

7.16 Walsall Youth Congress was established to help inform the development of the Youth Strategy. It was developed out of existing consultation mechanisms such as youth councils and projects, as well as devising innovative ways of engaging the disengaged. Representatives were drawn from all secondary schools, special schools, voluntary and statutory youth councils, and youth projects. A part time worker was given responsibility for developing the Youth Congress. Key activities the Congress has been involved in are:

- a young person represents the Youth Congress on Walsall Learning partnership;
- young people from the Congress were interviewed as part of the Best Value review;
- the Health Action Zone and other agencies sought input from members of the Congress to inform the development of their action plan.

OUSA

- 7.17 The Open University Students Association (OUSA) has an established and formal mechanism for representing learners' views. The Students' Regional Forum (elected by, and made up of students) meets quarterly with OU staff and associate lecturers on the Consultative Committee for Wales. The Students' Regional Forum represents the views of learners on a range of issues such as future progression on student numbers, discussing new programmes that have been introduced, marketing activities etc. Learners who are not members of the Regional Forum can express views either through local branches of OUSA, at the annual student conference or by contacting any of the Regional Forum members.
- 7.18 One example where learners have had an impact on policy development was in the naming of degrees. Prior to student intervention, degrees were awarded simply by their classification, i.e. BSc, BA. However, students had access to a mechanism for communicating their dissatisfaction with policy.
- 7.19 It was at the annual conference that students made the case for 'named' degrees. The motion to implement named degrees was passed by the student body at conference and subsequently presented to The Open University for implementation. The OU made the necessary changes to policy and named degrees were introduced soon after.

Summary

- 7.20 Whilst the above examples provide evidence of other organisations consulting with learners, the approaches adopted are quite different to that used in the pilot of the Adult Learners' Forums. In each of the above, the rationale for the consultation is that the learners have been brought together to discuss a particular issue or provider. They are not about bringing together learners to discuss generic issues and present their experiences of learning in general.

7.21 The NIACE/LSDA research highlighted that the forum process allows 'Groups to raise issues for providers to address, rather than suggesting immediate solutions themselves'. As such, the process of operating an open forum or unstructured forum will generate feedback to NC-ELWa, but is unlikely to address issues where action can be taken in the short-medium term. The forum process has more in common with setting the agenda for future research, rather than providing feedback which strategy can be developed out of.

Good Practice in Operating Forums

7.22 NIACE have produced a good practice guide to consulting with learners. They key features are:

- begin by identifying a core group of around a dozen learners with a brief to set up a learner's forum for their college, locality or region;
- be sure to include learners with different experiences, from different backgrounds, involved in different kinds of programmes;
- one or two sympathetic professionals could play a facilitating/administrative role at this stage but learners should be in the majority and should take on leadership roles within the group. The role of chairperson, for example, will be critical;
- arrange to meet regularly – about once a month seems about right;
- make sure you choose a venue that is accessible and appropriate;
- make sure no one is excluded from taking part by the costs involved. You will need to cover travel, child care, postage, telephone and administrative costs;
- groups work best when they have a clear purpose. Some initial help to identify the tasks which need to be done – including time scales and deadlines – will help to establish an early momentum;
- it is also important to develop medium and long-term aims so that the group members have a clear goal to work towards. This might include organising a learner's event or joint consultation with key decision-makers. It might involve establishing contact with learner's forums in other areas or joining a national network.

Other Approaches to Consulting Learners

7.23 In England, forums have tended to be coordinated at the local level, fitting local needs, and driven by the providers/stakeholders involved. Whilst NIACE support the concept of forums as a mechanism for generating feedback, they regard this as only one aspect of the consultation process. NIACE is due to publish a guide on other approaches to consultation. The other methods in the guide will include:

- interviews;
- focus groups;
- learners and neighbourhood forums;
- citizens juries and forums;
- partnerships;
- a charter for learning;
- listening campaigns;
- participatory appraisals;
- visioning exercises;
- using community arts and drama;
- creative meetings for adults and young people;
- learners/residents as researchers and promoters;
- learner representatives.

7.24 The Learning Partnership guide to consultative fora identifies different approaches to consulting and the mechanisms that can be used to deliver these. These are set out in **Figure 7.4**.

7.25 The examples shown highlight that there are many different mechanisms for engaging with learners. In deciding which approach to adopt, due consideration must be given to what the process is trying to achieve.

Figure 7.4
Some Consultation Mechanisms

- **Formal Methods** – Surveys, including telephone interviews in the home, in the streets, exit interview of people leaving learning, telephone interviews, postal questionnaires, structured group discussions.
- **Informal Methods** – Informal discussions, suggestion cards, questionnaires and suggestion slips in local newspapers/bulletins, telephone hotlines, consultation meetings, public meetings.
- **Participatory Methods** – Designed to help develop and involve learners in decision making, including Forums, Councils, Parliaments, Committees.
- **Deliberative Methods** – Designed to enable people to become better informed on an issue and discuss it with others before reaching conclusions and recommendations. Examples includes Citizens' Juries and Deliberative Polling.
- **Electronic Methods** – Technologies such as the internet, cable TV and video can be used to inform people and consult people.

8 CONCLUSIONS AND RECOMMENDATIONS

8.1 This section presents the conclusions and recommendations for whether the pilot of the Adult Learners' Forums provided an effective mechanism for generating feedback to NC-ELWa on the needs and views of learners. The conclusions focus on the operational and project management issues and recommendations are made for future activity.

Operational Issues

8.2 There was a clear partnership arrangement to set up and deliver the project, with clear structures and processes to manage its development. Both parties agreed that the learner should have a recognised voice within the debate on policy development, and that the forums could offer a collective learners' voice.

8.3 Due consideration was given to a number of factors which could impact on the successful outcome of the project, such as the role of the facilitators, the responsibility of the Steering Group and recruitment and engagement of learners. However, although discussed, it was not possible to secure funding for these elements once the project was established.

8.4 From the perspective of some of the younger participants, there was some confusion over their role in the process. In some CCET areas, clear consideration was given to the facilitation approach to ensure all participants, regardless of age or educational status, were engaged in the discussion. However, comments from some of the younger learners indicates that the process was not always successful.

8.5 Operationally, there were clear objectives for the Project Officer to fulfil which would determine the successful delivery of the project, and a mechanism was in place (the Steering Group) to discuss potential problems should they arise.

8.6 Despite having clear objectives, there is evidence that from the outset, the partnership struggled to agree on the purpose of the pilot. For NDC, the project was about setting up a network of forums that would regularly meet to discuss the issues that affected their learning experiences. It was intended to be an evolutionary process where the learners would have the opportunity to identify the issues that impact on their learning experiences.

- 8.7 For NC-ELWa, whilst it was recognised that this was about empowering the learners, the focus was about generating feedback against a framework of issues that could be used as an evidence base for policy decisions. This was a research project to test how effective this method could be.
- 8.8 Despite the disagreement about the aim of the project, for both parties, the central outcome for success had to be that the feedback from the learners' forum was used. This could be through further discussion at the AWALF where issues could be fostered and presented to panels of policy makers; or by being fed directly into CCETs, local providers, regional NC-ELWa offices or policy teams nationally.
- 8.9 However, it appears that this core element of the project was missing on both sides. The focus of the debate was on how the forums would be established and managed in operation. Mention was made at various stages (set up, in the contract and in the Steering Group remit), that consideration must be given for how the information was going to be used. However, there was no formal agreement on who would be the audience for the information outside of the Steering Group or how it should be recorded and reported.

Project Management

- 8.10 In terms of the processes and procedures involved for effective project management, the learners' forum pilot was well managed. A dedicated NDC Project Officer was responsible for ensuring that all of the activities involved in selecting and setting up the forums took place in a timely and rigorous manner; and a Steering Group was established and met regularly to advise on the operation of the forums and discuss the feedback generated.
- 8.11 The relationship between NC-ELWa and NDC was essentially a partnership approach, however, NC-ELWa were funding the majority of the project, and this infiltrated a supplier-commissioner element to the relationship.

- 8.12 The conflicting views on the purpose of the project have an obvious impact on whether the pilot can be regarded as 'successful'. The project fulfilled all the key performance indicators established for the project, in the evaluation framework. Furthermore, the dissemination event and other discussions with stakeholders show that the process of consulting with learners' in such a manner is well supported and encouraged. The learners involved have indicated that they consider the consultative process to be important and that they are keen to have an input into policy development.
- 8.13 However, a mechanism for how the evidence could be used to help inform learning policy development was not established. What was lacking from the project was a clear sense of purpose and formalised reporting structure for the forums to be of use in NC-ELWa's strategy development.
- 8.14 Adult Learners' Forums in their current format do not fit with either a structured research method, or the NIACE view of influencing policy through learner empowerment. The two approaches cannot be mixed as it is not possible to apply a rigorous research strategy to an open forum, where learners can discuss issues they are interested in. The research undertaken by NIACE and the LSDA identify focus groups and forums as two clearly defined mechanisms; they do not have the same outcomes if the two are mixed.

Recommendations

- 8.15 It is apparent that operating a network of learners' forums would provide a mechanism, which would allow learners to engage in the debate about the development of learning policy. However, evidence from the pilot suggests that there are issues with bringing together a regionally representative group of learners and generating information that can be analysed and presented to policy development teams, which would give any meaningful guide as to the priorities for action.
- 8.16 One of the fundamental issues in operating the forums was bringing a core group of learners together who would be able to meet at regular intervals. Other than Pembrokeshire, each forum had problems encouraging people to attend on a regular basis. This suggests that whilst the idea of bringing learners from different environments is sound in practice, it is very difficult to operate. Attendance is one of the main priorities of such activity.

8.17 York Consulting present two options for the future of consulting with learners face to face to inform NC-ELWa's strategy development.

Option One

8.18 Several stakeholders commented on the need to develop forums at the organisational level. Forums may be more effective if operated at provider level, as they could generate a sense of collective 'ownership' for the participants. Operation of the forums could be tied into the provider review process, as a means to generating learner feedback on the provider.

8.19 If forums were operated at this level, the issue with transport and additional time are not so marked as the learners are already travelling to the establishment and are likely to be in the vicinity when the forum is run. Some incentive for attending may need to be considered.

8.20 Whilst operating at provider level may generate some problems with the provider involvement and therefore the sense that learners can talk freely, this can be alleviated by allowing trained learners to lead the sessions and removing the provider from any involvement in the discussion.

8.21 There is clearly an understanding that the feedback from the forums is of value to both NC-ELWa and providers/CCETs at the local level. To report this information, a formalised reporting structure would need to be agreed analysing the responses under key themes, and understanding whether the issues were regional or learner group specific.

8.22 Potentially, the feedback from the forums could be analysed by a central individual, and any specific issues arising could be fostered by the AWALF at the national level. The information could also be presented to NC-ELWa as direct feedback into the planning and policy development process, and to the CCETS and local providers about the issues which affect learners locally.

8.23 It would be important to establish some guidelines or a best practice guide for providers to set up a forum. Furthermore, to provide an incentive for providers to establish a forum, NC-ELWa could include operation of a forum as a key performance indicator.

8.24 Funding may be required for the training and development of learners as facilitators, and for establishing the best-practice guide and reporting structure. The primary consideration for NC-ELWa would be that the feedback should be integrated into other mechanisms that report back the findings of the Customer Research Strategy.

Option Two

8.25 It was identified by a number of stakeholders that the research would be of more use if it addressed a specific issue. This suggests that a more 'purist' research approach would need to be used.

8.26 NC-ELWa could look at contracting a specialist research agency to carry out a series of national focus groups with learners, looking at specific issues, as with the example of the Scottish Executive consulting on Adult Literacy. Consideration may need to be given to contracting an experienced researcher to carry out the process. This would generate structured feedback against a particular subject.

Final Comment

8.27 Both of the recommendations made centre on giving the forums a focus or purpose. This is a move away from the NDC view of what Adult Learners' Forums should achieve. (i.e. allow learners to discuss the issues they want to raise rather than follow an agenda). However, the evidence from the pilot is that for NC-ELWa to be able to take action from learner feedback, it needs to be focused on specific subject areas. Open forums have true value in allowing learners to come together and reflect on their experiences, however, without detailed analysis of the data there is little tangible evidence from which action can be taken. The evidence generated from the forums could provide a platform for further consultation, but cannot be described as a direct feedback mechanism.

8.28 This is not to say that forums, operated in a 'pure' format, do not have a place in the consultation process, nor that a national network of forums is unachievable. Key changes in approach would be required in the following areas:

- significant re-structuring of the recruitment strategy would be required to promote ownership of the forums by the learners;

- development and sustainability of the forums would be more likely if the project 'coordinators/managers' could draw on a core group of learners who were already interested in joining the debate on issues which weren't necessarily locally specific;
- funding would be required to support the development and cohesion of the network, for training and development of learners to lead the facilitation and reporting process, as well as funding for travel and subsistence;
- the funding would need to be independent of learning provider/policy development agencies to ensure independence and autonomy;
- structure and guidelines would be required to ensure the forums were adopting a similar approach to consultation;
- consideration would be required to ensure that younger adult learners were represented in the process;
- a mechanism for reporting the outcomes and specific actions to carry forward against general policy issues would be required to ensure the forums were meaningful;
- engagement with those responsible for policy development would be required, e.g. representation on panels;
- a feedback process to the learners' forums would be required to ensure continued support and commitment.

8.29 For future consideration, the purpose, role and remit of the forums needs to be established before the consultation process can be of real value to both the learners and those who will be receiving the feedback.

ANNEX A:

QUESTIONNAIRE

Thank you for agreeing to complete this questionnaire.

Anonymity and confidentiality are a priority, however, for the purposes of the pilot project we would like to use the information toward the following: -

1. ELWa's Customer Research Strategy
2. Your local CCET recommendations
3. The All Wales Adult Learners Forum

Question 1

Can you say what influenced your decision to participate in learning?

Question 2

Which subject/course have you chosen?

Question 3

What were the reasons for choosing this particular subject?

Question 4

Can you tell me about what motivated/influenced you to learn?

Question 5

What are your ambitions/aspirations for the future?

Question 6

Have there been any issues that have affected your potential?

Question 7

Can you tell me about any barriers that could have prevented you from learning?

Question 8

Have you experienced any fears or concerns about your learning experience?

Question 9

What sort of advice/or guidance have you had?

Question 10

Who gave you this advice?

Question 11

Were all your queries answered in a satisfactory way?

Question 12

How could this process be improved to help learners?

Question 13

What sort of help have you had before, during and after your learning experience?

Question 14

Did you experience any problems during your enrolment?

Question 15

Tell me about your early views at the beginning of your learning experience

Question 16

So far how have you felt about the provision of your course/learning?

Question 17

What are your views on the place where you learn?

Question 18

Can you produce a wish list on an ideal place to learn?

Question 19

List here your good experiences of learning

Question 20

List here your bad experiences of learning

Question 21

Do you have any say in the drafting of policies that affect your learning and should you have?

Question 22

What can you do to help reach those not engaged in learning?

Question 23

What can learners do to promote Lifelong Learning?

Question 24

Is there equality of opportunity for all who wish to partake in learning?

Question 25

Is informal learning encouraged and rewarded enough?

Question 26

Why do people want to learn?

Question 27

Why should learners learn what others want them to learn?

Question 28

Should learners' be involved in the planning, management and monitoring of provision and why?

Question 29

Are the structures of social support e.g. dependant care, childcare, travel costs and other financial assistance sufficient to assist the disadvantaged back into education?

Question 30

Do you think that there is a need for an Adult Learners' Forum and what would be its' function?

Question 31

Do you think there is a need for an International Adult Learners' Forum and what would be its' function?