

## 1.0 Background and Context.

### 0.0 What is EQUAL?

What makes EQUAL different to mainstream ESF? The answer to this question identifies what should be evaluated within the EQUAL Learning Virtual Sauna initiative.

Key to EQUAL itself are the principles of:

- Innovation,
- Partnerships,
- Transnational actions,
- Dissemination and mainstreaming.

Additional principles on which EQUAL places great importance are those of Equal Opportunities and Empowerment.

EQUAL projects are funded to test innovative approaches, “test beds” for improving access to vocational training and employment, particularly targeting disadvantaged groups within society. The Learning Virtual Sauna transnational partnership incorporates all these aspects of the EQUAL initiative through its emphasis on “improving the quality and access to training and employment, with a particular emphasis on the use of Information Communication Technologies, linked to the developing European Knowledge Society”.

The key requirement of the EQUAL programme is that of **transnationality**. The evaluation process needs to measure the added value provided of the partnership working together, i.e. what has been achieved through the partnership at each national partnership level as well as at transnational partner level, which would not have taken place if these partnerships had not come together. The evaluation also needs to take account of each partner’s own expectations in regard to the impact of the project. To do this, it will be necessary to identify the relevant baselines, i.e. what each partner was already undertaking in regard to their national project and what each partner’s expectations of the results of the project will be. Once these baselines have been determined, it will be possible to measure the added value for each partner and for the whole transnational partnership. The evaluation process also needs to identify if each national partnership is complementary and supportive of the other national clusters of partners, and includes the partners needed to ensure mainstreaming and sustainability beyond the life of the Learning Virtual Sauna transnational partnership.

Finally, the questions, which should always be at the forefront of any discussion, activity and involvement, must relate to how community projects and end users (the beneficiaries) benefit from the Learning Virtual Sauna network.

So.....

- How does the transnational activity empower stakeholders and beneficiaries?
- How is equality of opportunity improved and delivered through the transnational partnership?
- How does a community-based project and/or an individual stakeholder benefit from the activity of the Learning Virtual Sauna network?
- What is the added value of the transnational co-operation agreement?

## 1.2 Transnational context at the launch of EQUAL in the UK

Tessa Jowell’s presentation at the UK EQUAL launch made strong reference to transnational actions, recognising that there was already strong transnational partnership work as a result of ADAPT and the previous Community Initiatives. Her focus for the added value within EQUAL was clearly stated:

**“EQUAL will encourage better focused transnational partnerships”**

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In Mr Johanis' presentation clear reference was made to the importance of co-operation with the pre accession countries, which in round 1 could not be included within transnational partnerships. However, what was missing within both their presentations was the question,

**“What added value does the transnational partnership bring to the beneficiaries and stakeholders (at all levels) within each partner country?”**

The GHK evaluation of ADAPT and EMPLOYMENT states that all Development Partnerships must comprise of a:

**“Substantial and effective element of transnationality throughout the life of the project”**

Examples given included:

- ✓ joint development of methods and approaches to training and job creation
- ✓ the exchange of trainers and trainees,
- ✓ the 'benchmarking' of successful partner countries, training and management systems,
- ✓ the organisation of joint conferences and workshops.

Jane Evans (Head of the European Social Fund Unit) in her presentation at the EQUAL launch did not include transnationality within her definition of the EQUAL objectives, which she defined as: employability, business creation and adaptability, lifelong learning, gender pay gap and asylum seekers. The only concrete references made related to:

**“Positive examples of transnational co-operation” from ADAPT and EMPLOYMENT and that EQUAL does require transnational co-operation”.**

The GHK evaluation of ADAPT and EMPLOYMENT found that promoters frequently had **limited expectations of the benefits that their transnational activities could offer** at the outset. Over 50% would not have included a transnational component in their projects, although “project managers commonly described how the actual benefits of transnational activities exceeded their expectations”. The GHK report provides no clarity as to these benefits but does state, **“the benefits of their experiences were likely to be realised in the future.”**

This analysis sets the baselines for the evaluation of the Learning Virtual Sauna.

### 0.0 Aim and objectives of the external evaluation

The overarching aim of the external evaluation is to meet the requirements of EQUAL, in providing an external evaluation report on the transnational co-operation agreement and partnership formally known as “The Learning Virtual Sauna”.

The specific objectives of this transnational evaluation are to:

- Gauge the extent the project has been effective within the partner organisations
- Identify how effective the partnerships have been – what has worked and not worked
- Identify (if any) changes in the organisations to the innovative ways of working
- Determine whether the partners understand how to motivate and engage the target groups in the context of lifelong learning
- Identify whether specific solutions have been found to meet user needs requirements
- Identify whether the partners have targeted different learning environments and experiences to help them set up their learning interventions
- Establish how effective the learning ambassador has been as a tool to engage learners
- Identify factors leading to good practice
- To make recommendations and improvements within the transnational partnership
- Identify the added value of the transnational co-operation agreement
- Identify the impact of the transnational co-operation agreement at all levels of activity

The transnational evaluation will address –

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- Why these transnational partners?
- What do the partners believe they will learn from each other?
- How do the partners perceive their roles within the transnational co-operation agreement, are these recorded?
- What are the “common goals”?
- What do partners want for their own organisation from the transnational co-operation?
- What can each partner ‘give’ to the transnational co-operation in regard to specific expertise and/or knowledge?
- What will be achieved through the transnational partnership that could not be achieved without it?
- What are the perceived barriers?

These questions were addressed in the external evaluation of the Learning Virtual Sauna transnational partnership.

### 1.4 Methodology proposed.

- Production of questionnaires for all the Development Partnership’s and projects/stakeholders to complete and return (**Annex A**)
- Analysis of the results of the questionnaires
- Desk research on activity, analysis of reports and other documentation provided by the partners
- Production of a transnational project specification ( **Annex B**), which provides the key data on the aims, objectives and intended results of the transnational partnership activity
- Participation in transnational meetings and delivery of an evaluation workshop which included peer evaluation by the Development Partnerships, project staff, and beneficiaries, in Sweden in September 2004. (**Annex C**)
- Visits to projects and meetings with beneficiaries within each national partnership
- Identification of how the key EQUAL principles of innovation, transnationality, empowerment, equal opportunities, ICT are integrated into proposed activities and results
- Identification of how the four themes of Learning Ambassadors, Learning Environment, User Needs and Motivation and engagement were addressed by the transnational partnership.
- Identification of the real added value and impact of the transnational activity on each national partnership, at community project level and on beneficiaries.
- Identification of how the transnational partnership impacts on policy at national and transnational levels
- Identification of how each partner aims to valorise mainstream and sustain learning from the activity of the transnational partnership and it’s activity.

### 1.5 Activity undertaken

The following activity has taken place, to gather information for the transnational evaluation:

- Production of 3 questionnaires for all the partners and projects to complete to enable “baseline data” to be collected (**Refer to Annex A**)
- Analysis of documentation provided by the transnational project managers (desk research).
- Production of the Learning Virtual Sauna project specification, identifying key objectives and outputs/outcomes and deliverables to be achieved. (**Refer to Annex B**)
- Visits to the 14 Black Country EQUAL Learning Kitchen projects, to assess transnational activity, added value and impact.
- Attendance at the transnational meeting in Sweden, 15-18 September 2004 to run an evaluation work shop with all the partners. (**Annex C**)
- Visit to Kista Open Academy, November 2004
- Visit to COESIS projects in Portugal, September 2004 and February 2005
- Production of a transnational leaflet and hand outs for the Black Country Knowledge Society Conference March 2005 (**Refer to Annex D**)

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- Production of feedback report for partners in March 2005 (**Annex E**)
- Analysis of documentation provided by partners from UK, Sweden and Portugal
  - Comparability of each partner's context and national projects (**Annex F**)
  - Comparison of theme User needs (**Annex G**)
  - Comparison of theme Motivation and engagement (**Annex H**)
  - Comparison of theme Learning Environment (**Annex I**)
  - Comparison of theme Learning Ambassadors (**Annex J**)
- Support for the beneficiary visit to Brussels from the 14 Black Country Learning Kitchen projects (**Refer to Annex K**)

### 1.6 Barriers within the evaluation process

The transnational evaluation was not contracted until late July 2004, over 14 months into the delivery. A number of issues were identified, which impacted adversely on the external evaluation process:

- No central secretariat was in place, to collect all the data from the activities of the transnational partnership to date, even though the agreement identified the Learning Kitchen partnership as taking the lead on this.
- Initially a varied response from the partners to the value of the transnational evaluation process and to the value of this work.
- The start date of the external evaluation started as the summer holidays were beginning, which delayed response to the questionnaires and agreements on visit dates
- The Portuguese partners were completing their transnational participation in September 2004, and the Swedish partners in December 2004, although the latter was finally extended in Sweden to May 2005 in line with the UK.
- Differing levels of funding for each transnational partnership, Portugal 60,000 Euro, Sweden 340,000 Euro and the UK 466,600 Euro

Finally, it would not be appropriate to ignore the tragic accident during the external evaluation visit to Portugal in October 2004, which resulted in the ASCUDT Learning Ambassador Isabel Braganca being killed. This tragic event has left all the partners feeling this loss, but particularly for the Portuguese partnership. Isabel had been a friend as well as working colleague and direct beneficiary in the COESIS project. Injury to the external evaluator also delayed production of the transnational report, as the final visit to Portugal to complete the research could not take place until February 2005.

## 2.0 The Learning Virtual Sauna Network

### 2.1 What is EQUAL Learning Virtual Sauna?

The transnational partnership Learning Virtual Sauna aimed to promote the identification, validation and transfer of know how and good practice between partnerships and between member states. Through transnational co-operation the partnership wanted to create joint products, systems and added value for policy development at the national and European levels. Specific objectives of the partnership were:

- Understand how to motivate and engage the target groups within the context of lifelong learning
- Identify and develop strategies and methodologies to engage the target groups
- Integrate non formal/informal learning into the emerging learning pathway
- Find solutions which meet user needs
- Discuss, research and report on different learning environments and experiences in order to help partners to set up their learning interventions
- Pilot and validate the role of learning intermediaries (The Learning Ambassador)
- Define the role and design/develop a common curriculum (certification) for Learning Ambassadors

➤ Provide guidance and a range of tools for policy makers in the context of ICT learning

## 2.2 The Transnational Co-operation Agreement

The transnational partnership in place was formally entitled the “**Learning Virtual Sauna Network**” and includes partners from Portugal and Sweden also funded under EQUAL. In the early stages of the transnational partnership, it also included in the early stages an associate partner in Finland, which paid for their costs of participation from their national government budget. Each partner is listed at **Annex L**.

English was agreed as the common language.

The partnership formed as a result of **common purpose** as well as common objectives, which are summarised below from the transnational co-operation agreement:

- All partners were working with disadvantaged target groups including unemployed, immigrants/ethnic minorities, low paid, people with disabilities and “social” organisations
- All the partners used common themes of Learning Ambassadors (Animators), Learning Environment, Motivation and Engagement and User Needs. Each partner was identified to lead on a theme, with Portugal and UK sharing the theme of Learning Ambassadors

Empowerment, equal opportunities and innovation as guiding principles within EQUAL were common to all partners.

- Edutainment – linking education to the entertainment/leisure environment was to be a model to be explored to “engage and motivate”
- All the partners integrated action research within their national projects and agreed to share information at transnational level
- All partners aimed to develop new strategies to both engage and retain target beneficiaries
- ICT was identified as the underpinning theme in each country.

Common issues, which needed to be addressed as part of the transnational co-operation, were identified

- Similar target groups –
  - people disadvantaged in the labour market (unemployed and employed), including people with disabilities, young disaffected, lone parents, low paid, low skilled including those lacking basic skills (literacy, numeracy and IT), ethnic minorities including immigrants, refugees and asylum seekers
- Similar problems and barriers to be overcome:
  - how to “engage” (hook) and motivate hard to reach target groups including the use of peer support and mentoring;
  - how to empower beneficiaries to help them make their own choices, improve their confidence, meet their needs as users of services, retain their motivation to completion of their learning programmes (retention), recognise, evidence and value the learning which takes place in informal and non formal environments, measure “distance travelled”;
  - how to ensure learning environments are supportive and sympathetic to the individual needs of the target group, ensuring they feel safe, secure and comfortable within their learning environment;

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- how to use and contain the added value offered by ICT in providing access in rural and urban communities to learning including basic skills, IT and vocational programmes;
- how to create flexible, customised, appropriate and responsive learning programmes and content
- Use of ICT and IT based Learning Environments
- All partners were exploring the use of ICT to widen access to learning for non traditional learners from new “virtual environments” to the development of new e-learning materials

Kommentar [I1]:

### 2.2 Is the partnership fit for purpose?

The partners came together as result of the development of the Learning Kitchen project. Those responsible for writing the application brought the partners together at development stage, having worked or had knowledge of them from previous activity. This ensured some clarity of vision and common purpose within the transnational co-operation agreement finally produced. However, what was not taken into consideration, was the fact that these organisations had not worked together as a transnational partnership before this venture began.

The four Learning Kitchen themes (User Needs, Motivation and Engagement, Learning Environment and Learning Ambassadors) were integrated into activity at transnational level, providing a “themed” framework through which activity and analysis could take place. Each of the transnational theme groups were led by one of the partner countries, which enabled the roles and responsibilities to be evenly shared:

- Sweden - research into end user needs
- Portugal – Learning Environments
- UK – motivation and engagement
- Portugal/UK – Learning Ambassadors

This country leadership approach provides an excellent example of delegation of workload, and also reflected each partner country’s very specific area of interest. Sweden also agreed to take on the leadership role in regard to dissemination, using their expertise in IT and web site development as the key methodology. (Refer to separate section on dissemination).

The evaluation process has included a comparison of each partner, their context and the content of each national application in terms of deliverables at national level. A full analysis is attached at Annex F, but the key comparable data is detailed below:

- Labour market – all partners had identified the needs of “disadvantaged” target groups, within local economies which had high levels of unemployment, particularly within these communities of interest. Each partner country was also addressing isolation, whether it related to geographical location or to community of interest. Of interest from Sweden, is the recognition that such communities can be just as isolated within the large cities such as Stockholm, as well as in rural areas. This resulted in the Stockholm municipality in setting up new learning centres within five boroughs, to reduce isolation for these communities and to open up access to learning.
- Target groups – all had targeted disadvantaged groups, both in employment as well as unemployed. These included lone parents, people with disabilities, ethnic minorities, long term unemployed and women. Sweden resulted in not having “direct” beneficiaries as a result of cut backs at the initial stages of EQUAL in Sweden, although latterly from December 2004 to May 2005 have been given additional funding to undertake pilot activity with ethnic groups in Stockholm. From the Swedish perspective the beneficiaries were the organisations, particularly within the voluntary sector, which supported these target groups.
- National content – each partnership had one common aim in terms of what they hoped to deliver within their national context. This was to widen participation to learning for those where access currently did not exist. All partners identified that use of ICT was important

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to achieve this aim as well as being interested in exploring non-formal learning environments, and learning, which did not lead to recognised qualifications.

- Use of ICT – Each partner’s common goal was to use ICT to develop a “virtual learning environment”, which provided access to learning. Sweden already had a national network of learning centres in place, which would be used as one of the virtual learning environments on which to build their proposed “Open University”. Portugal built a completely new virtual learning environment and within the Black Country a number of the projects developed their own virtual learning environments using ICT.
- Equal Opportunities – all national projects addressed this as opening up access to learning for disadvantaged groups, and removing identified barriers to participation to learning. Barriers to access were very different in each country, but common purpose within the transnational partnership was to identify these and explore how they could be removed.
- Empowerment – this was the weakest element in terms of initial feedback from all three transnational partners. However, during the evaluation visits it became clear that at both beneficiary and stakeholder levels within each national context, empowerment was being addressed and delivered. The most interesting aspect was in Sweden, where the Development Partnership and the individual partner organisations were empowered to deliver to their beneficiary target group as a result of influencing policy at local and national levels.
- Dissemination – although this was led by KOA from the Swedish partnership, the dissemination working group set up at transnational level was representative of all the partners. (Refer to Learning Virtual Sauna final report). The task was deemed of such importance within the TCA, which it was made up from the senior managers from each of the Development Partnerships as well as the leaders of the theme groups as appropriate. Dissemination focussed on the use of ICT based communication channels, web site and “transnational policy level conferences”, to try and achieve change. The culmination of this activity was the final “hearing” in Sweden in May 2005 also included policy makers from the Black Country.
- Mainstreaming and sustainability – supported through the dissemination process, but never really addressed within the partnership as a key EQUAL principle by the transnational partnership as a whole. This also reflected weaknesses at national levels, where “mainstreaming”, as an objective was not treated with the same level of importance as other objectives. It has to be said that the Swedish model was the most effective, but came about as a result of the cut back of EQUAL funds rather than initial intent. This action by EQUAL in Sweden ensured all the Development Partnership’s allocated resources were focussed on creating change within the Swedish education and training system for adult learners to access higher education and learning. The “hearings” as part of this process were an excellent model for influencing change at policy levels locally and nationally. KOA, within the Learning Virtual Sauna final report states that these “hearings” were influenced by the first Black Country Knowledge Society conference in the UK, proving that transnational activity can impact in the other partner countries.

The transnational partners had “common” interests and purpose identified within each of their national plans, which adds strength to the transnational co-operation, as the transnational programme is complementary and supportive of national aims. Although details may vary, this need not be a barrier.

The Development Partnership structures were also complementary, including national partners from public, private and community and voluntary organisations. This enabled learning to take place of each other’s education and training structures and of the learning process in each country. Individual organisations could relate to their own counterparts within the partner country structures.

### **2.3 Did each partner have a common understanding of the Learning Virtual Sauna themes?**

The desk research, analysis of the questionnaires returned and the visits to each of the partners enabled a comparison of how each of the theme groups were operating at each partner’s own national level. These results are detailed in Annexes G – J. Key findings are:

- **User Needs:**

- ❖ In the Black Country the theme group explored what target beneficiaries needed before, during and after their learning programme, and how this could be delivered. “Users” were identified in terms of their very individual circumstances and their individual needs to empower them to access learning and support. The User Needs group within the Black Country, took the lead at national and transnational levels, to meet needs identified by involving their beneficiaries in beneficiary led events within the Black Country, and including them in transnational meetings to add to transnational discussions on these issues. Feedback from the other transnational partners clearly saw this of real benefit and one of the key learning points to take forward in future activity.
- ❖ KOA’s main goal has been to deliver equal opportunities for adults in accessing higher learning and education– to develop an open-university without the requirement for any formal exams and/or other restrictions for entrance. The difficulties that adults and ethnic minorities face have often been the focus within the national activity and this has been translated within transnational discussion. The obstacles have been identified, including the capacity building needs (training trainers, basic skills, ICT) for the BME associations, which will ultimately deliver this activity. Work started within four small pilots, as a result of the additional investment from EQUAL for the period of December 2004 to May 2005.
- ❖ The COESIS Development Partnership has identified as the focus for “User Needs” the main questions concerning the need to make an ICT product accessible for people with disabilities and people who are socially excluded. One of the products is the COESIS portal that will be accessible to all. This portal opened up the “world” to beneficiaries with disabilities from Braganca, isolated from each other due to the extremely rural area in which they lived, where public transport was not available to them. It made job search more accessible in Oporto, where long-term unemployed could access a range of job search support through the portal supported by the Learning Ambassador. All the beneficiaries could access a range of learning programmes to meet their training needs, their personal interests and allow them to communicate with their family and peer groups through e mail and on line discussion groups.

The learning, which has been identified from feedback from this theme group as a result of the external evaluator’s input at the meeting in Sweden, includes:

- ❖ Recognising the UK’s more non-traditional approaches to the engagement of learners, use of volunteers, involving a range of non-traditional and non-formal providers, where Sweden and Portugal have a more structured approach. This has been identified as a new possible approach for Sweden through Kista Open Academy to implement, working with NGOs and those particularly supporting ethnic minority groups. The pilot for Learning Ambassadors, which was funded at the last stage from December 2004, used some of this learning. Portugal has a similar approach to Sweden, with little use of volunteers within the training system, but recognised during the evaluation visits that peer group support was happening, where beneficiaries did work and help each other within the workshops.
- ❖ From the UK context, recognising the real added value of beneficiaries meeting together socially, which had not been available in either Sweden or Portugal. The UK Learning Kitchen beneficiary stated that being able to drop into the centre at any time for a cup of coffee and a chat was meeting a really important need from the beneficiary’s perspective. Although the aim was social and not formal, it was just as important to the “recovery” and learning process.
- ❖ In Sweden and Portugal, provision of transport to access training was not an issue, where in the UK, it was identified as a major barrier for people with disabilities. In Sweden, user needs were very much integrated into the mainstream funding provision. Innovative to the Portuguese project, was the development of the virtual learning “portal”, which was used by beneficiaries not only to access learning, but also to meet certain of their needs

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including communications with family, friends and others in their peer group with similar interests and hobbies.

What was clearly of value within this working group, was the input of one of the UK Learning Kitchen beneficiaries, who questioned ideology and approaches. He stated that being involved as a user himself, had really impacted on his need for personal self development and improving his own confidence and self esteem, which had been badly affected as a result of his accident.

Barriers for this group in terms of working at transnational level, which was led by Sweden, was the fact that Sweden did not have any beneficiaries (users) to support within their EQUAL project, as a result of cut backs in funding by the Swedish EQUAL office. Their "users" were the organisations they were supporting in order to develop their knowledge of how learning can be delivered in more non-traditional ways. These "users" included NGOs, traditional training organisations and local, regional national authorities with whom they were discussing and lobbying in terms of opening up higher level learning to non traditional learners who currently did not have the traditional access qualifications. This resulted in both the UK and Portugal addressing the identified issues from a practitioner perspective, working with beneficiaries in learning, while Sweden needed to address issues at a more strategic level.

This resulted in participants feeling disappointed with the outcomes of this working group, and as one participant fed back

There was a definite positive relationship within the User Needs group at transnational level. A desire to make things happen existed, but the thrust needed to pursue such aims subsided in between conferences. There was no lead to take issues forward. This may be the result of Sweden's poor leadership, but also, possibly, from the fact that all UK personnel had other roles and responsibilities within their own jobs on return from conferences. There was also a lack of leadership and entrepreneurial activity within the management structure of the Learning Kitchen partnership due to changes in personnel over a two-year period.

I have always maintained that theme leaders should be employed solely on EQUAL in order to enable things to happen. People employed in full time roles other than EQUAL are unable to give the full concentration and responsibility the project deserves.

Other than visiting projects in Sweden and Portugal and showing partners centres in the UK, I feel very little was achieved in the way of positive results.

In September 2004, the User Needs workshop identified real potential for further activity, but time was against them. Portugal had officially finished their EQUAL project, and Sweden was due to finish in December (although this was extended). Opportunities identified included:

- ❖ Development within the Portuguese portal of a tool to support beneficiaries from the three countries in communicating with each other on a social basis, if not through a common language, through creative ways such as drawings and photographs.
- ❖ Sweden and Portugal investigating how they could use the "social" gatherings as a concept in meeting their users' needs. The group in the UK has been set up by the beneficiary, and has had a number of successful events.
- ❖ Sweden to consider involving the transnational partners in a Swedish led "hearing", to deliver presentations and possibly to also involve beneficiaries. Such an event was organised for May 2005. **(Refer to Annex N).**
- ❖ All countries in making better use of the Swedish led cAME web site, made available for both internal dissemination of results and external.
- ❖ More project based visits, to understand each partner country's education and training system, as well as the context in which each partners had to operate.
- ❖ Need to formalise the capture of learning from the exchange of experience as a result of the transnational meetings, and the visits to projects.
- ❖ Need to capture more beneficiary case study material

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It was clear from the feedback from these groups at the Swedish external evaluation workshops, that each participant from each partner's country, had been viewing work within the transnational User theme group, only from the perspective of their knowledge of what happened in their own country. In all the transnational theme groups, this restricted the development of joint initiatives and resources.

The recommendations from this group on the basis of the overall learning experience, for any future similar activity was summarised on one of the questionnaires returned by the Learning Kitchen theme group leader for User Needs in the Black Country:

I would request, as theme leader, knowledge of the budget allocated to make the theme group workable and able to contribute to the stated aims (at national and transnational levels) – this has never been the case. I would expect to have some power and influence in how the budget could be spent. This would speed up decision making and enable projects to happen. I would bring in more beneficiary influence to the theme group at an earlier stage of the project. The Action Plan would be a standing agenda item from Day 1. The theme group would have greater autonomy and freedom to initiate transnational working with our partners. The current Learning Kitchen structure is bureaucratic and decision making comes from the top. Decision-making is therefore slow, it lacks knowledge and is constrained by budgets that nobody seems to know anything about (except that there isn't any money for that!)

I would not be theme leader, as I would expect someone to be financed to take on a full time or part time role. This would enable them to give full concentration to the task in hand.

### • Motivation and Engagement

The desk research, analysis of the questionnaires returned and the visits to each of the partners enabled a comparison of how each of the theme groups were operating at each partner's own national level to be made. These results are detailed in Annexes G – J. Key findings are:

- ❖ The Black Country Learning Kitchen partnership worked together to try and understand what will motivate hard to reach target groups. Members of the group explored ways in which to "hook" learners into learning through identifying their particular interest. Initially, many projects thought that access to IT learning could be such a hook, but it became clear from experience that this did not apply to all beneficiaries. The "hook" could lead to using IT as a tool to feed the interest but IT was not always the prime interest. Hooks identified as being successful in attracting learners into projects included hobbies (photography, music), culture and heritage, arts and genealogy. For young people the CRYSLIC robotics project appealed to those with interest in science fiction. Finally, key to recruitment in community based learning is "word of mouth" recommendations from ones own peer group.
- ❖ The main activity in Sweden was to share experiences and best practice / results between the Swedish partners within the Development Partnership. All countries have had difficulties to engage people into formal learning to increase their competence to get a job. This is not the only barrier for the individual, they might not have the confidence or there could be other reasons. It is a big challenge in Sweden to find methods for the learning society to market their courses and to hook the students in a positive way. Providers also need to offer an attractive and good quality product on demand and this is not always an easy task for Swedish higher education and training organisations.
- ❖ Access to ICT has been the key motivation and engagement factor for COESIS. In general all learners have wanted to ICT to interact with each other and access information, which will impact positively on their lives. Older people who initially were more reticent were soon converted to the benefits of using the COESIS portal once they saw the information, which was available through this system. The key to continued engagement has been the support from the Learning Ambassadors, who have supported them in using ICT and sign posting them to the resources. Learning Ambassadors are able to develop unique learning programmes for each beneficiary, clustering relevant

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activities and information in the learner portfolio. Each beneficiary can learn at their own pace in an environment, which is safe, friendly and secure working with others from their peer group with whom problems can be discussed.

The learning identified at the external evaluation workshop by this theme group is summarised below:

- ❖ In order to engage and motivate, the needs of the target groups must be assessed and addressed. Although, there may be similar needs between the target groups, they may not all want the same approach to the delivery of learning. The right hook is needed, to engage with, and then retain them in learning. This has to include the most appropriate learning environment for each learner.
- ❖ Exchange of experience between the transnational partners is important, and more visits to projects should have been organised as part of Learning Virtual Sauna.
- ❖ The major difference between the UK compared to Sweden and Portugal, is the use of volunteers. Sweden and Portugal do not have a volunteer culture, whereas in the UK becoming a volunteer, and learning while working as a volunteer has become a recognised option as an “intermediate labour market” model. Portugal had tried this model, but it had failed.
- ❖ All the partners recognised that their expectations from working at transnational level were not the same. KOA was working at a “lobbying” level rather than in delivering pilot projects. Their key aim was to keep all their partners’ organisations engaged and motivated to remain active within this process.
- ❖ All the partners recognised that they had not fully understood the empowerment process, and this had not been properly addressed at transnational level.
- ❖ All the partners agreed that it was important to “engage others by finding out what matters to them”. It is important to listen, speak the language that beneficiaries understand, remove jargon, recognise and accept beneficiaries’ cultures and backgrounds, move learning into the communities where it is accessible to more people, offer free access to IT.

In regard to further work within the transnational partnership, what was identified as most useful was more exchange activity between trainers and support workers, and supporting beneficiaries to benefit from transnational exchange.

### • Learning Environment

The desk research, analysis of the questionnaires returned and the visits to each of the partners enabled a comparison of how each of the theme groups were operating at each partner’s own national level to be made. These results are detailed in Annexes G – J. Key findings are:

- ❖ The Black Country investigated environments, which offered less traditional venues for engaging with learners and alternative ways of offering learning. The aim was to meet individual learner’s needs in terms of where, when and how learning should be delivered to be more attractive to the non-traditional learner. This included the exploration of learning in formal, non-formal and informal environments as well as new e-learning environments, with partners from the community /voluntary sector, private sector as well as more traditional further education colleges. Accessibility has also been addressed.
- ❖ ICT environments have been the main thrust for KOA under EQUAL, exploring how an open-university can be delivered on a national basis using the national network of learning centres for non traditional learners to access higher education, which at the moment is not possible. As such the key learning environment has related to **e learning**. KOA explored the pedagogical model/interface with communication systems and what training is required. What support is required from the tutor/support worker in the environment, recognising these are non-traditional learners? What will be the Physical interface [CD, web, TV, games, chat room, etc]. It has also been important to produce guidelines for the production of content and interfaces and to produce reports for dissemination.

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- ❖ COESIS recognised a broader view of a learning environment as something that facilitates the learning process. For the COESIS Development Partnership a learning environment is a physical, intellectual, psychological environment which facilitates learning through ICT connectivity and the community. In implementing this theoretical view the COESIS project built a “Learning Community” supported, through ICT, which sustains a network of learners. This learning environment has specific features, which promote life long learning (including life skills, employability, citizenship and entrepreneurship) as well as the acquisition of basic skills including literacy, numeracy and IT. The ICT learning environment has also overcome barriers of rural isolation as evidenced with the pilot in Bragança, where people with disabilities are brought into the centre and can access the COESIS portal’s (web site) learning resources as well as the internet, reducing their feelings of isolation.

The learning identified by the group during the external evaluation workshop in Sweden in September 2004 is summarised below:

- ❖ The high turnover of staff within both the UK and Portugal has impacted badly on continuation of discussion and therefore progress.
- ❖ The Transnational Co-operation Agreement is too complex and over ambitious.
- ❖ It would have been useful if a formal learning model could have been identified to capture the learning of each individual in each of the theme groups.
- ❖ More effort at the start of the process should have been put in to understand each partner country’s context, culture, national project and in addressing language issues.
- ❖ More induction should have been given to the transnational partnership on what was needed from this work, and how it needed to impact at each national level.
- ❖ National priorities have left the group at transnational level struggling to identify common synergies. This would have been helped if more study visits had taken place earlier within the project.
- ❖ No structure was put into place to empower the group to deliver. It would have been improved if a communications strategy could have been developed for working together outside of the transnational meetings, and ensuring everyone was kept informed.
- ❖ Actual project delivering organisations need to be involved in the development of the transnational co-operation agreements for them to be successful.

Actions, which were agreed to be followed after this meeting were minuted by the theme group, and related to the design and implementation of a “formal Learning Environment portfolio”, a joint product to be developed. The aim was to explain how an ICT based learning environment could be set up, to become a tool for others in the future. The work plan agreed is detailed below:

Tasks	Members involved	Completed by
<b>1.0. Produce the content for the Learning Environments Portfolio</b>		
1.1. Write the contextualization for the Learning Environments Portfolio	Portugal	10/10/04
1.2. Write the Group’s conception of Learning Environments	Sweden	20/10/04
1.3. Personal Histories – Learning Impacts	UK, Sweden, Portugal	30/10/04
1.4. Complete template for Portfolio documents		30/10/04
» Pedagogical Design Model of a learning community	Portugal	
» Design Pedagogues for specific target groups	Sweden	
» Personalised pedagogy for people with acquired disabilities	UK	
» Study Circles (collaborative learning pedagogy)	Portugal	

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» Summary of checklists & research on good practice in user interface design	UK	
» Demonstration user interface (web-based) using report on best practice.	UK	
» Digital case – study records developed by learners	UK	
» Learning objects: a transnational experience	Portugal, Sweden	
<b>2.0. Proceed with the Learning Objects task [knowledge transfer between Sweden and Portugal]</b>	Portugal, Sweden	31/12/04
2.1. Virtual meeting in the Swedish learning objects Hub	Portugal, Sweden	07/12/04
<b>3.0. Proceed with the Web Accessibility issue</b>	Portugal, UK	31/12/04
3.1. Articulation between Portugal and UK: documentation support	Portugal, UK	30/11/04

### Future steps...

#### ❖ further work planning:

- articulation with the UK for uploading of the Portfolio content.
- articulation between Portugal and the UK to accomplish the accessibility issues – UK and Portugal
- further articulation between Portugal and Sweden to accomplish the Learning objectives and issues

Due to the time constraints, and lack of response from the UK, this project was only part developed between Portugal and Sweden.

#### • Learning Ambassadors

The desk research, analysis of the questionnaires returned and the visits to each of the partners enabled a comparison of how each of the theme groups were operating at each partner's own national level to be made. These results are detailed in Annexes G – J. Key findings are:

- ❖ The Black Country Learning Kitchen partnership aimed to develop a formally accredited learning programme for **beneficiaries** from any one of the Learning Kitchen projects to undertake to become Learning Ambassadors. Learning Ambassadors would be equipped with the skills and tools such as laptops to be able to recruit others from their local communities and their peer groups, working in a voluntary capacity initially. The work undertaken by Dudley College clearly identified that no one qualification was suitable to meet every potential Learning Ambassador's needs. As a result they identified possible "pathways" for beneficiaries, that could meet each learners particular aspirations but started with the recognition of what skills they currently had, and which skills needed to be developed. This approach did create tension within the Learning Ambassador theme group in the UK, where expectations were very different. As a result, Learning Ambassador projects developed more naturally at each project level, some within the formal learning process, some in more informal and non-formal environments such as St. Thomas Network, Equal Pathways and the Lighthouse.
- ❖ In Sweden there is not the tradition of volunteers and unpaid work. Sweden has examples of paid professionals working as Learning Ambassadors in the open learning centres supporting non-traditional learners to access training through the use of ICT. This concept will support learners within the Open University programme if successful in being implemented. Within the EQUAL project, KOA has focused on new open flexible methods for guidance and counselling in the public system and have shared experience of this with

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partners. As a result of the late investment of EQUAL funds for the period of December 2004 to May 2005, four small pilots were delivered in NGO groups within minority communities. The models from both the UK and Portugal influenced how each community group delivered their programme.

- ❖ The definition of a Learning Ambassador (mediator) within the COESIS project is a “human development technician”, activity being directed to the promotion of alternative and innovative ways of enabling social and professional inclusion of disadvantaged people, demonstrating the functionality and relevance of the use of ICT. An individual’s participation promotion of interest in learning is an effective strategy in increasing employability and in combating exclusion. Learning Ambassadors in the COESIS project are paid professionals with relevant degrees, such as psychology. COESIS has developed a training programme and content, which includes social exclusion, mediation, ICT, empowerment and life long learning. The programme has not been accredited and CPRG have stated they will not take this forward. The content has however been validated by the national EQUAL office for inclusion on the EQUAL web site for wider dissemination and valorisation. The training content is located on the COESIS portal.

The major learning from this group was reported back in the theme group transnational questionnaire, completed by the transnational theme group leader:

The major difference has been that the Portuguese partners expected the Learning Ambassador function to be carried out by “**professionally qualified members of staff**” initially. They later became interested in this work being supplemented by “volunteer” ambassadors, who had been through the learning process and could therefore help others to take up and benefit from learning.

The Swedish approach was much more structured, there seemed to be little scope for voluntary activity. Learners seemed largely to be directed to undertake learning in order to obtain benefits or get work. This difference in fundamental approach made it difficult to achieve a common theme to discussions but the introduction of new ideas to the Swedish way of looking at learning could possibly be a long-term benefit.

The Black Country approach was more mixed from the start. There were already several projects using “volunteers” involving training and some proposals for training of staff (e.g. library counter staff). An issue in the UK was the possibility of incentives for Learning Ambassadors; any monetary reward above expenses would affect benefits, so we were looking at the provision of computers or mobile phones/palm tops as an alternative “incentive”.

Exploration of a common training package at transnational level was impossible for the group, as each had its own interpretation of what was needed. The UK was intent on delivering an accredited programme, very much as “one training course for all”. The Portuguese partners had developed their own training programme, which was installed on the COESIS portal so that Learning Ambassadors could access this from anywhere, and at a time suited to them. (Refer to Annex M). This model has impacted positively on the mainstreaming and sustainability of this project beyond the life of EQUAL, in that vocational teachers who work in normal classroom environments have begun to access this training, so that the COESIS portal can be used in their teaching. This training package reflected that their Learning Ambassadors would be qualified to degree level, and supported their “paid” role within an organisation, introducing them to the portal and how to use it.

Learning Ambassadors has been a difficult theme to address at transnational level with different cultures and traditions in each of the participating countries. No common purpose was identified for the exchange of experience. The leader of this theme group changed through the time frame. The final questionnaire from the theme group leader stated as the overall results:

Transnational discussions resulted in a common understanding of the ideas behind the concept of Learning Ambassadors and the skills and experience required of people involved in the activity. Meetings at transnational conferences allowed the common features to be explored and discussed and some interesting conclusions were reached. The differences in approach of the different partners meant

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that detailed analysis of needs and requirements of learning ambassadors was not practical. Language difficulties of both workers and clients were felt to be an insurmountable barrier for the workers on the ground to undertake joint training or exchanges.

The infrequency of the meetings and lack of contact between conferences meant that there was a lot of necessary duplication in discussions at each meeting, to recap on what had gone before and bring new members of the group up to speed. We did try to keep the same group members, but this did not work due to people getting new jobs etc.

The Learning Ambassador group was really a missed opportunity to further develop concepts both at transnational and Black Country Level.

Other learning from the experience has been identified:

- ❖ At a transnational level there was not enough time to develop ideas at each meeting, which often focussed on a conference rather than giving time to the theme groups to work together. Several sessions at each transnational event would have enabled this part of the Learning Kitchen/Learning Sauna activity to be of more value, and would have been a better use of time than listening to some of the more academic speakers at the conferences.
- ❖ More communication should have taken place between conferences.
- ❖ Much more clarity at the beginning of the project as to what the theme groups were intended to achieve at national and transnational levels would have helped.
- ❖ It took a long time to work out how the theme groups were intended to work at a Black Country level, never mind at transnational level. There was very poor communication from the Equal management structure regarding aims and practicalities. This should have been addressed much more quickly. There was also considerable confusion about further funding – clarity here would have saved a lot of time and enabled our ambitious programme to stand more chance of success.
- ❖ There was a lack of leadership in the group – I seemed to end up leading the group by default after several key people dropped out, which meant that there was no one who attended Learning Kitchen DP meetings for a long time to pass on key decisions etc.
- ❖ It was felt that with a relatively small amount of extra effort and support and at the right time would have hugely increased the chances of success in piloting the Learning Ambassador training across the Black Country and introduced incentives as intended. This would have helped the transnational aspect from the Black Country perspective.
- ❖ The key factor needed for success is to be flexible and inclusive in the approach to the theme group. It is important to allow everyone to contribute and this can only be done by if necessary abandoning rigid plans and allowing the theme to develop as the experiences of the participants becomes evident. This makes it very difficult to lay down and achieve a rigid structure at the beginning of the project. Guidelines are needed though, in the type of activity that should be expected.
- ❖ Realising that there are so many common themes across Europe and reinforcing that to get the most from transnational activity a lot of effort is needed in building relationships with the partners on a personal and institutional level. When this works well the benefits are tremendous, and the reward is well worth the effort.
- ❖ A transnational celebration event would have added real value to the work undertaken by all the partners.
- ❖ Involving the end user of the proposed activities has had a beneficial effect on discussions – the practical element is brought into focus by the experiences of learners themselves. Important insights into the whole ethos of EQUAL have come from the beneficiaries who have attended the transnational sessions.

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- ❖ More time should have been spent working in the theme groups rather than at transnational conferences.
- ❖ The project as a whole would benefit from more full time staff who alone can ensure that things like the theme groups continue to make progress by providing support and direction. It is not possible for staff already employed to do a job on a full time basis to manage this type of project effectively.

It would have been good to arrange visits between countries for staff and beneficiaries as shadows, for example, but this was not practical or funded. There were too many differences in some aspects of the proposed work, especially assessment and accreditation, which we soon realised could not be reconciled in the time available. In the long run “trans European accreditation” will become a key issue, as more and more people move between countries to work. We could not hope to address that here, but it has certainly raised awareness.

- ❖ The transnational theme group did recognise the potential for further co-operation, using the jointly produced Learning Ambassador job description as the vehicle to promote further transnational exchanges of Learning Ambassadors. This, and the developing training programmes in each country, as a result of each of the pilots, would have easily been transferred into a Leonardo da Vinci mobility application.

There is huge potential for transnational working, particularly in the field of helping people to adjust to changing work patterns. The idea of Learning Ambassadors to help people back into learning is a powerful one and, although it would require funding to do properly, it would make learning much more effective for many individuals.

At a transnational level policy and decision makers must recognise quickly that movement of people around Europe and the world to meet demands for work will continue to increase and that this needs to be properly managed, accreditation needs to be sorted out. Maybe the idea of learning ambassadors can play a role here.

### 2.4 Barriers for transnational collaboration.

Feedback from the external evaluation process has been captured and is shown below:

- A major barrier for both Sweden and the UK, was the lack of clean cash match funding from both countries. Both partnerships depended on “match funding in kind”, which has effectively reduced the investment into the projects at national level as well as transnational levels, to 50%. As a result, neither country could appoint staff to work full time on the EQUAL projects, and particularly at transnational level. Both Development Partnerships felt that such initiatives, which clearly meet national policy and strategies, should receive match from the relevant public authorities. This is what happened in Portugal.
- Differing levels of expertise within the partnership in working at transnational level certainly delayed the implementation of real joint activity. Learning Kitchen had no experience of this, which left them not really fully understanding what was required from them as a partnership. Too much time in the first 18 months was spent in meetings, which had no real focus, plan or identified outcomes to be achieved. This, with very little work and co-ordination outside of the transnational meetings in the Black Country and Portugal, has resulted in very little joint activity between the partners. Both the Black Country and Portugal also suffered from constant staff turnover, which made this situation even more difficult. The Swedish partners, led by KOA had much more experience, and the evaluation process has identified their frustration at times at not being able to move activity forward as quickly as they would have liked. One partner stated “ we felt very much like a teacher who had a continuing subject but a new class every time, but I am not disappointed with the exchange of experiences because it was very interesting and has been useful”

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- From an external evaluation perspective, the transnational co-operation agreement was far too ambitious for a partnership, which had not worked together before as a transnational partnership. This with the lack of real understanding of what could be achieved through transnational co-operation, what added value could be accrued, little active planning, few available resources at transnational level and weakness in overall transnational co-ordination has resulted in not all the deliverables being achieved to full potential.
- Another barrier, has been the different time frames in which each partner has had to work: i.e.
  - ❖ UK receiving approval until May 2005,
  - ❖ Portugal to September 2004, (extended to December 2004)
  - ❖ Sweden initially to December 2004, but in the last 3 months extended to May 2005, with an additional injection of funds to “pilot” the Learning Ambassador programme with beneficiaries.

This has had an adverse impact on the transnational partnership in enabling them to plan their activities.

- Lack of overall leadership and management has been a crucial weakness, in not being able to deliver more at transnational level to fulfil the TCA. The Black Country was designated to lead on the transnational co-operation as stated in the TCA, but with constant staff turnover at senior level within the Black Country co-ordination team, this role was not fulfilled.
- Differing funding levels between the partners for working at transnational level, also reduced the ability of Portugal to be able to undertake as much activity as the UK and Sweden. Financial cut backs in the transnational budget by the Black Country as a result of issues related to match funding also reduced the capacity for planning and delivery.
- The lack of partnership activity in between transnational conferences was a real weakness. Not having someone paid, on behalf of all the transnational partners, to work solely on the transnational activity has been an issue, particularly in Sweden and the UK, where many of the project staff, also had full time jobs back in their own organisations. However, Sweden did keep working on the transnational work plan as agreed at the meetings, and integrated the learning through their strong Development Partnership. This did not happen in the Black Country, where most of the stakeholders had little or no understanding of the transnational aspects of the work when the external evaluation began mid way through Action 2. In Portugal, again as a result of staff turn over, little activity took place outside of the transnational meetings, mainly as a result of changes in staff once again.
- The cAme web site/database was set up to encourage greater interaction between each of the partners and provide an opportunity to share reports and resources. However, comments from the Black Country included “even though UK reports and a mid term evaluation was placed on the web site, it was only a short period of time before the documents had ‘disappeared’. The website is still open though for those who want to use it. Another comment made from the UK included “ Access to the web site and database was provided only to a select few”, but from KOAs perspective everyone who sent them an e-mail address were immediately provided with access. Comments from the Black Country indicated that access was a problem, but from KOA’s understanding this was only an issue from one of the Portuguese partners where there was a firewall issue.
- It was suggested/recommended that staff and beneficiary exchanges be introduced. However, there appeared to be a lack of knowledge regarding the financial budget situation for Learning Kitchen, so this initiative never saw the light. The other partners had not built this into their budgets, although the Swedish organisations did participate in the transnational activity. Their learning helped the four minority community organisations to deliver their pilot Learning Ambassador programmes.

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- It was also a general feeling that most of the transnational conferences over the three years involved many hours of listening to 'academic' lectures rather than visiting local projects and talking to project managers about their work. Participants' overall impression was that this was lost opportunity to gain an insight into the work being carried out transnationally, and opportunity to develop joint projects and resources.
- The same has been stated about the two UK "transnational" conferences, in that rather than the three days being given to EQUAL, the conference was "badged" under the 'Black Country Knowledge Society' (BCKS). The second conference in the UK had addressed the feedback from the first, but the emphasis was still on the work of the Knowledge Society, and very little towards supporting the mainstreaming of the learning from EQUAL. This was confusing for some of the transnational partners, while others built on this as can be seen from the final Swedish conference in May 2005. Some of the Learning Kitchen projects felt that the conferences were organised to promote BCKS rather than the EQUAL project. It was organised to serve the interests of the Black Country Consortium and dignitaries as opposed to EQUAL stakeholders, beneficiaries and for those at the 'coalface' who had made EQUAL successful in the Black Country.
- Another disappointing aspect of transnational working was the Learning Kitchen policy of inviting the same personnel from the projects to each conference. This resulted in many from the projects not having the opportunity to experience the partnership working. The reason for this was the way transnational meetings tried to deal with both project management and theme development work, as well as study visit type activity and attendance at conference. The study visits should have been kept separate, and could have been used as the vehicle for more project staff participating and developing bilateral joint activity, which would have offered real added value to the total transnational co-operation. As far as beneficiaries were concerned, a total of three were invited to conferences in Portugal and Sweden. Managers appreciated the desire to keep the same personnel for continuity purposes, but the policy deliberately excluded many of whom, would have benefited from the experience.
- From the Swedish perspective, the most difficult aspect has been the constant changes in staff from the UK and Portugal in terms of attendance at project management and theme development working groups, as a result of staff turnover. This has impacted in a negative way on the deliverables of each of the transnational theme groups. A comment from the Swedish leader of the transnational User Group " [But I'm disappointed about the lack of a report about barriers from UK and Portugal. End User requirements are often also structurally prevented by the system and this could have been a more research based transnational product to take up to the authorities.....The only responsible persons from UK were Colin and Josie and they contributed a lot but both had finished before the final meeting when we should have completed the work. I was really sorry for this because we felt really alone from the Swedish side](#)"
- Language has also been identified as a barrier for communications, both at the transnational meetings, but also outside of the meetings. Interpretation was not made available during meeting sessions, as it was not requested, but with hindsight may have been useful for some participants on some occasions.

## 3.0 Impact

### 3.1 Impact on Learning Kitchen and potential for the further collaboration

It was clear from the questionnaires returned, and in follow up meetings that individual project managers and workers initially felt that there had been no real added value at either project or beneficiary level as a result of transnational activity undertaken. The Development Partnership could not respond to this other than stating that those staff involved in the transnational work benefited on an individual self-development basis. Some staff reviewed this opinion later within the project as a result of the external evaluation process helping them to gain benefit, particularly for some of their beneficiaries.

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The Learning Kitchen partnership lacked leadership in regard to the transnational activity, which played a secondary role outside of the transnational meetings. There was lack of direction in regard to what the transnational co-operation agreement was expected to deliver, but this was also as a result of staff turnover at leadership level within the programme and at delivery levels. Not one stakeholder seemed to have been able or empowered to link the work and/or learning back into the national context in the Black Country. As a result the learning from transnational work, which was taking place but not being fully recognised, was not being measured in terms of impact on the Black Country Development Partnerships and the projects at Black Country and/or borough level.

The question of “what is the added value of transnational work?” was not being addressed at any level or by any one of the stakeholders within the overall Development Partnerships, even when senior staff within one of the boroughs questioned this and the value for money. No common structures had been put into place cross the Black Country to ensure both transparency within the transnational activity, as well as to measure the impact of transnational activity at Black Country level. Systems could have been put into place, which could have translated this work back into the delivery of specific Learning Kitchen objectives and measured both added value and value for money within the national/sub regional and/or local context. Not only did this result in lost opportunity, but left individuals and organisations vulnerable to criticism and accusations of “going on jaunts”.

This is not to say, that real added value was not achieved within the Black Country, because as the case study below indicates, it clearly was. Sadly, more could have been achieved, if greater understanding had been in place at the beginning of the transnational co-operation, and all stakeholders had been inducted into the purpose and opportunities, which transnational activity could offer.

### (i) Evidence of “added value”.

Twenty-two beneficiaries from the Black Country participated in a visit to Brussels in November 2004, and met with MEPs. Here is what Theresa wanted share on her return to Sandwell:

“hi tracy its teresa townsend the beneficiary from skills active. first of all i would like to thank you from the bottom of my heart for helping to make it possible for me to go to brussels and to go on a plane both of which ive never had to opportunity to go. im so grateful and still on a high. i op that you didnt think i was drunk when i was talking to the m.e.p. my medication for the migraines that i suffer with make my speech slurred. i have never had much of an education 30yrs have passed and i havnt learnt anything untill now with skills active. so because of the course that ive been on with skills active i feel that i want to move on & learn more & to perhaps explain to people what ive gained from it. The Trip that i went i will never, ever forget & im still on a high with excitement. as its not everyday you meet m.e.p's in brussels. there was a photo with lizlyne which we had taken in the european parliament which i would love to have as a keep sake to frame it and put in my scrap book please. please could you find a way of getting them to me. it was the ones where we had them took in that room remember. on my sickness benefit i get £54.00 p/w but im willing to pay to have them copied if i have to, it's worth it. I ope that you recovered from not feeling well on the way bk. as when i got back i was as sick as a dog lol. im the half cast one who was always laughing”

This visit impacted positively on the learning, motivation and personal self-development of the project staff in a similar way. All felt that they had helped their beneficiaries achieve in a way, which had not previously even been considered as a possible or practical option. Partners from both Sweden and Portugal have commented on the real value of this type of activity, and agreed that for their future transnational activities, this would be included. All stakeholders learned how powerful the “voice” of the end user could be within this transnational context, as target audiences were more likely to listen to them, then the project staff, regardless of whether these staff were at the coal face or at policy level.

**Being EQUAL in Brussels, an appeal to policy makers everywhere!**

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“Don’t worry, he’s got all his fingers and toes!” Was the first thing I heard the midwife say after the birth of my son. And I breathed a huge sigh of relief. But why? What makes us crave this so-called state of ‘normality’? Well let me try to explain what it’s like if you’re not....

I’ve just come back from a trip to Brussels with a group of people you’d find hard to describe as ‘normal’. We had wheelchair-users, people with learning difficulties and mental health issues, single parents, blacks, Asians and sensory impaired. I’m not sure of everyone’s sexual orientation (it wasn’t that kind of trip!) but apart from openly obvious gays and lesbians we looked like we’d been hand picked by the ‘Friends of Political Correctness Society’. But did it bother us? Well yes it did, actually. We couldn’t find restaurants to accommodate us, even after a two-hour trawl around the city centre. We had to travel by different modes of transport. We couldn’t hear what they were saying in some very important speeches. We got ‘tutted’ at for delaying passengers boarding the plane. We couldn’t all access the facilities even in our own hotel rooms. But for us, that’s normal.

I’m using the royal ‘we’ as though we were a gang of mates who’d deliberately got together to test the accessibility of Brussels. In fact most of us met for the first time at Birmingham Airport on the way out there. We’d been thrown together by the Black Country’s EQUAL programme, a three-year initiative funded by the European Social Fund through the Black Country Learning Kitchen. EQUAL is about giving people opportunities to learn new skills - the cynics would say just one of many schemes to give do-gooders a job and keep ‘wasters’ out of the statistics.

But the unusual, somewhat magical, thing about EQUAL is the fact it has really worked, and really made a difference.

Part of the reason for its success is that it makes learning, both real-life and interesting, realising that not everyone is cut out for the academic option. Take me for example - I was a straight-A student in both junior school and High School, gaining 13 top grade O-levels by the time I was 16. My working class parents, spying great things ahead for me, started scrimping and saving to put me through further education.

Yet by my 17<sup>th</sup> birthday I’d developed a complete aversion to classrooms and even books, and have never been involved in ‘formal’ learning since.

EQUAL uses different ways to engage people, encouraging them to start learning, continue learning, enjoy life more fully and broaden their employment opportunities. Projects use a variety of hooks such as sport, drama, robotics, music, art and technology to get people interested in something – anything - then introduce them to other options. Sometimes people who have been excluded from ‘normal’ routes lack the confidence to enrol at night school for example, or just stroll into a learning centre and ask what’s on offer.

So there we are in Brussels anyway, visiting our MEPs at the European Parliament to tell them EXACTLY what EQUAL has done in the Black Country. They’re ready to listen. Another day, another speech.

Kevin speaks. A former soldier serving in Germany, his life was shattered by an accident which ripped his brain apart. He survived, just about, went home and sat there.....and sat there.....and sat there.....and put on five stone and one day thought he might not want to sit there any longer. Without a future, without friends, he contemplated the great escape.

Fortunately in the nick of time he got picked up by the Wolverhampton EQUAL programme.

“It has turned my life around,” he tells us. “I’ll never regain everything I lost physically, but now I’ve got my confidence back and I’m learning new skills. I work now teaching other people and in my spare time I’m setting up a social group for people who’ve gone through stuff like me, because you do feel isolated and alone and it helps to know there are other people out there experiencing the same things.” Well they’re certainly listening now. Theresa tells a similar tale, but with her it was the bullies who kept her down and out and feeling worthless.

Our passion for what we’ve achieved is so real you can almost taste it. And it’s not just the participants who are doing the talking. A manager speaks now, telling our European representatives of her pride in her work, even trying to sell them a product from her group. It’s not normal this enthusiasm, is it?

There’s an uneasy sense of equality about us that you can’t quite put your finger on.

As we mill about the great halls of the Parliament later I’m approached a couple of times by well-spoken, very well-meaning officials. (I’d best explain, I’m the one in the jeans, relying on my walking stick on this trip to drag my crippled legs around this vast building.)

“And have you benefited from your course?” they inquire pleasantly. There’s a rather awkward, shuffling silence as I have to explain I develop and co-ordinate projects, and unfortunately am not a participant.

Then there’s H, immaculate in a suit and tie, groomed to perfection with not a hint of an impairment in sight. Every inch a manager? Well guess again....

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What beats me is how anyone can think they are immune from this 'disease' of inequality. Fair enough, we may all lie back contented with a smug smile of satisfaction when we hear our first-born has 10 perfect fingers and 10 perfect toes. I did, even though as you may have gathered I wasn't born as one of those 'perfect-toed' babies

Neither was the lovely Elaine, another one of our gang. Elaine, now in her 50s, was excluded from mainstream education and institutionalised for most of her life because of a severe facial deformity and physical impairments. Through EQUAL, she has studied photography and dance and gained confidence, friends, a job – and a passport. Her child-like quest for the knowledge that most of us take for granted is inspirational to all of us in the group.

But what makes us think that inequality is down to birth? Take Eric, another Brussels buddy. He was a publican and family man before suffering a severe stroke when he was only in his 40s. Now Eric's a good man, don't get me wrong, but he'd be the first to admit that when he ran his pub he didn't wake up every morning thinking how best he could accommodate a wheelchair in his bar or get it down the steps into the toilet.

Now Eric can only go to the bar when he's wheeled in. And by God those steps are important now.

Another woman with us got involved in an EQUAL project to get her back to reality again after living and coping alone with her children. She wasn't a single mom by design – she'd had to kick her husband out of their home when the twins were only two months old because she could no longer afford to feed his drinking habit as well as her children.

You see what I mean? You never know what's around the corner. You can't sit back any more with an 'I'm alright Jack' approach.

We were in Brussels fighting our corner and talk funding. That's what it's all about you see, money. Without funding, projects like EQUAL don't happen. But what happens when the cash stops flowing? Fair enough, our little gang of travellers have become equipped with skills and knowledge to battle away at 'mainstream' society and find a way in. But there are millions more like us who haven't had those opportunities. One successful project doesn't mend the wall, it just papers over a crack.

These projects are making a real difference to people's lives AND to the local economy. Now the Learning Kitchen is looking to key decision makers and influencers to champion these projects and help create a blueprint for sustainability.

For even though there is value in simply participating in these projects, the beneficiaries need to be linked into a mainstream, vibrant network to flourish long term.

We have to get the message over to Government, industries, educators and policy makers that initiatives like EQUAL should not be short-term plasters, but should be part of the cement that holds the world together.

Because none of us know what's around the corner, and none of us can be guaranteed to be 'normal' forever.

### (ii) Missed Opportunities

All project managers and staff interviewed wanted to participate more fully in further transnational activity, to ensure that projects and beneficiaries did really benefit from the impact of transnational activity. However, for more of this to have taken place, greater investment and more co-ordinated support was needed, to help resource development in this area.

Staff who had already participated in transnational activity stated that on a personal basis in terms of their own continuous professional development, they had benefited greatly from the experience. As a representative from the Learning Kitchen partnership noted in Sweden in 2004:

Terminology is different to that used in the UK. For example immigrants who are unable to read and write in their own language were described as "illiterate" (literal translation) whereas we prefer "basic skills needs", and "immigrant" is widely used, and strictly accurate, although the word has different overtones in the UK.

Also, John writes about the overall experience from the staff exchange programme:

The most rewarding aspect was having the opportunity to find out how things are done in the different countries, and in the Black Country at the UK conferences. It was very interesting to see how the Portuguese partners were able to use the idea of Learning Ambassadors. Swedish partners were

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operating in a different environment – here it was more interesting to see the facilities and understand the structures for adult education in general, particularly for new arrivals in Sweden.

Sadly, this learning has not been formally recognised within each individual's own staff development programmes or recognised through national benchmarks and/or standards such as Investors in People or continuous professional development qualifications. This was because the transnational work was not seen by the Development Partnership early enough as to having real benefit, so systems were not put into place to capture this formally. One comment made was that it was the same few who participated at each transnational event. The main reason for this was the fact that each transnational visit focussed on the "project management work" rather than the transnational development and joint activity. In hind sight, the development, supported by more study visit type activity earlier on, could have been kept separate to the transnational co-ordination and management process. This would have allowed and facilitated more "project to project" activity, where the real added value would have been delivered. Feedback evidenced, that staff from Learning Kitchen projects either knew nothing about the transnational activity, it's purpose or relevance, or had very little understanding of who and what the transnational partners were about.

Beneficiaries who had participated in transnational meetings/activities stated that this had been enjoyable, worth while and of benefit to them on a personal basis, but again this learning has not been formally recognised within their own personal learning programmes. Denise, who participated on the Sweden visit in September 2004 wrote:

" I personally found the experience of travelling to Sweden to be very beneficial to me personally; it gave me a chance of visiting the different venues, attending the conference and meeting new people to be invaluable. A few years ago I would not have had the confidence to do this, but I believe that in the last year, being on the project Capturing the Past has built my self-assurance in my self. However, since returning from Sweden, I have made a decision to go back to college and gain qualifications, to get back in the work force. I would like to thank everyone involved for the opportunity for giving me a second chance".

A number of the Learning Kitchen projects were keen to "test" through transnational pilot activities, whether their experience in the UK was relevant and transferable from an UK context into a wider European market place. These are described below, and identified by theme:

### **(iii) Transnational exchange of information, experience and further development opportunities**

Many project staff have been involved through the transnational meetings and conferences in sharing knowledge, experience and good practice from each partner country. There has however, been little time within these transnational programmes to actually visit specific projects. The most successful meeting from the perspective of understanding what happened in the other countries was the visit to Sweden in September 2004, where an extra day was added into the programme for some project managers to visit projects deemed of interest to them.

#### **• Learning Ambassadors: Dudley College and community partnerships.**

This project was targeting "adult returners" to learning from the priority areas of Dudley, including people wishing to move from volunteering to paid employment, unemployed, older workers (50+), and ethnic minority groups especially women. The project aimed to offer training in community based learning, working with community bases such as St. Thomas's Network, Lighthouse and the Dudley Muslim Association. Training included basic skills' awareness, IT and use of on-line learning and mentoring. Learners were involved in the development of some courses, the web page and used laptops to provide flexibility in regard to location. Participants became actively involved in the recruitment of further beneficiaries to learning or to employment, using all the skills they had learned to empower them to become Learning Ambassadors.

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The St Thomas Network community based pilot project has certainly evidenced empowerment as can be seen from Noel's case study. Noel was volunteering with St. Thomas to deliver maths support to learners at the centre and ultimately wants to become a maths tutor on completion of his City and Guilds 7407 Certificate.

**Noel was empowered as a beneficiary by being supported by the St. Thomas network in participating in the transnational visits to Portugal and Finland, where he worked in joint sessions with the development partnerships from all the transnational partner countries. At these meetings discussions focussed on the development of a “job description” for Learning Ambassadors, and the project manager from the St. Thomas Network would wish to continue this development through both staff and beneficiary exchange programmes.**

**Noel was taking his skills, knowledge and experience of being a Learning Ambassador within a community base into the “professional discussion forum” of the Learning Ambassador theme group, on an equal basis as a volunteer Learning Ambassador at transnational level.**

Potential for further collaboration in this area includes:

- ❖ Completing the work to finalise the job descriptions for Learning Ambassadors, which could be practically applied within a pan European education and training market. Job descriptions could include variations to reflect paid and/or volunteer status. Each partners country could look at the “common core” of the job descriptions, and use this to support transnational activity, which could be then validated as part of the a “whole” training programme developed and accredited by an awarding body/agency in each partners country.
- ❖ Undertaking further staff development exchanges with appropriate transnational partners, to understand the different national contexts in which these Learning Ambassadors would and could operate, bringing learning into non formal learning environments.
- ❖ With the transnational partners, as a result of these staff exchanges, agree the type of placements which each partner could offer to each other’s Learning Ambassadors to pilot the job description(s) and identified tasks in the different types of community based projects and organisations.
- ❖ Recruit, interview and offer placement opportunities to Learning Ambassadors from each country, to work in transnational partner projects as Learning Ambassadors
- ❖ Monitor, review and adapt the job descriptions as a result of these placements and undertake a further pilot as a result
- ❖ Investigate how these Learning Ambassador placement programmes could be continued/sustained beyond the life of EQUAL through identification of further possible funding opportunities such as that offered through the Leonardo da Vinci programme.
- ❖ Investigate how the learning from these placements can be validated through accreditation/certification in each partner country or through Europass.

### **(iv) Parallel development of innovative approaches**

Through the transnational theme working groups, project staff from all partner countries have exchanged their methodologies and approaches in delivering against theme group objectives within their national projects. Learning Ambassadors has been particularly successful in this, in that a common “job specification” has been developed for the Learning Ambassador role.

#### **(Annex M)**

As a result of ongoing consultation between the UK and Portugal, Dudley College leading on the Learning Ambassador theme for Learning Kitchen also included two beneficiaries within their Learning Ambassador learning programme who were in work as a trainer and a social worker. Within Learning Kitchen, the target group for Learning Ambassadors had traditionally been unemployed learners, while in Portugal because the concept of “volunteers” was not recognised, they recruited and “paid” their Learning Ambassadors. The college recognised that even professionals already trained to support their client group, may not necessarily have the skills needed to be Learning Ambassadors

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Sandy is working as a Social Worker and has had experience as a practising Mentor prior to joining the course. She did not have any accreditation in mentoring and joined the course to gain it. Sandy has a strong commitment towards completing the course, and she is a valuable member of the team. She maintains a positive attitude towards the other students and herself.

Sandy has completed her course work on time even though she finds it difficult to attend the course with all of her other commitments. She said that she “ finds the commitment hard as far as time management is concerned.”

She is becoming an experienced Mentor, and has joined in with the class role-play on more than one occasion. She accepted positive and negative criticism from the members of the group in a mature and sensitive way. Sandy is interested in completing a Basic Skills Awareness course

The Learning Environment Community Arts “Antena” project targeted young people and adults with disabilities and health issues. The project offered informal learning environments, training people with disabilities in new technology arts skills and offering and supporting access to e learning. Antena stands for “Arts New Technology – Encouraging New Abilities”.

The project aimed to provide creative technology arts projects for groups of people of varied ability across the borough of Walsall, particularly those who did not have easy access to services. The project had a focus on young adults. Community arts workers ran the sessions in a variety of settings, which provided new approaches to arts technology training through innovative projects that ultimately linked separated community groups either physically or through the internet. The project worked with beneficiaries to develop new projects which include to date ANTENA (sound technology and animation), BARRIERS (dance and technology addressing bullying in schools) and BIG NIGHT OUT (focus on event management). Arts workers are brought in to fit the needs of the project.

Antena enabled local people to voice their ideas, aspirations and hopes for the future whilst giving them practical tools to engage in learning that is relevant to current technology developments. Beneficiaries were fully involved in the development of the projects based on their identified needs. The beneficiary steering group set up within the project guided the development worker to areas of development needed. The technology drama project Barriers enabled school children to ask disabled people about attitudes, stereo types and about being disabled.

Local Authority Education departments outside of the Black Country are hoping to book this type of theatre work, which will sustain the learning beyond EQUAL. This recognises the work that the beneficiaries have put in. The project co-ordinator has seen beneficiary self-esteem grow and the work has brought smiles to their faces and will have a life long impact on them and others. After each performance the beneficiaries are challenged as "experts" which empowers them and develops their confidence and self-esteem as well as pride in their achievement. They have described the project as "life changing".

Potential for further collaboration includes:

The project workers want to move the development into a transnational context, to test this approach in non-UK informal learning environments. Activities would include:

- ❖ Dissemination of models of working through staff and beneficiary exchanges including putting on a performance.
- ❖ Arts worker exchanges to lay the foundations for future collaborative transnational projects, continuous professional development including work experience to provide the skills and knowledge for the development of a transnational community arts based project.
- ❖ Set up links between beneficiaries on a transnational basis, with the aim of developing a beneficiary exchange programme,
- ❖ Developing a project with a Portuguese partner to look at accessibility through a transnational visit by beneficiaries.

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- ❖ Research existing models of similar activity as such as that undertaken by CAPE UK which uses the Leonardo da Vinci programme for arts based staff, arts workers and beneficiary exchange and placement programmes.

### Case Study: Motivation and Engagement: Capturing the Past, Walsall Libraries

Capturing the Past used family, local and community history themes to engage and motivate adults to learn basic computer and Internet skills. Capturing the Past offered individualised and flexible provision that was able to work with adults who have varied life experiences, culture, heritage and learning support needs. Many of the Capturing the Past beneficiaries had been out of work for more than 36 months due to ill health or disability and were in receipt of benefits. Many were approaching their sixties when the prospect of employment is less likely.

The project was a first rung and non-formal learning opportunity building confidence and interest in ICT. It was a community based project within the more deprived Walsall wards. Sessions took place within the informal learning environment of selected branch libraries using IT facilities provided by The Peoples' Network. The programmes could lead on to home-based ICT learning; occasionally the purchase of a first home computer, or the confidence to use an existing PC that was previously the domain of a partner or children. There were several ICT progression routes available to beneficiaries e.g. CLAIT courses in the libraries mobile ICT vehicle (Lampost) and ICT classes run by Walsall College tutors. The take-up of these courses was very limited amongst EQUAL beneficiaries who appeared to want practical applications with ICT as a 'means' rather than an 'end'. Beneficiaries were empowered to use the library Flexible Learning Centres or a home PC independently. They were encouraged to have an email address and to receive and send emails. They were enabled to search the Internet and to understand how to access web sites. Beneficiaries were empowered to develop research skills and to work systematically, learning to consider and test alternative hypotheses and to be persistent.

Further development was taking place through new "autobiography" projects being developed for the Gujarati community and the African and Caribbean community where English and basic skills were an issue. Women with Gujarati heritage were working to produce an autobiography template (Mari Jivankatha) which was to be made available as an online resource. They were working together to document their childhood memories. This approach was being replicated within the African and Caribbean communities for Black history month (Back to my Roots). Both these projects were using the expertise of these communities to devise learning materials and content. Beneficiaries are empowered to understand that they are the experts in their own past and that their memories are unique and valuable. They learn that they can choose to share their research or memories with others. Beneficiaries are empowered by being involved in activities which are commonly regarded as prestigious – researching your family or documenting your past.

Potential for further transnational collaboration for this project included:

- To continue to pilot the autobiography worksheets with local people in Sweden and explain Capturing the Past project to Swedish community workers.

Janet discussed the "Trip down Memory Lane" sheets with staff of the centre, who have adapted the idea to provide information about achievements in their country of origin, to help give them confidence and to compare work in their original country with Sweden. The approach is much more formal in Sweden, but seemed to be a useful tool to help build confidence and encourage people to value their own skills and knowledge.

- The transnational project could be piloted through EQUAL Learning Virtual Sauna, or partners could investigate submitting applications through SOCRATES GRUNDTVIG and Leonardo da Vinci placement and exchange programmes. Actions need to include:
  - ❖ Staff exchange programmes to:
    - ✓ promote understanding of the Capturing the Past approach to engaging adult learners
    - ✓ identify how the work sheets can be adapted for the Swedish context,
    - ✓ identify how ICT can be used to create a beneficiary chat room to enable and facilitate beneficiary involvement within the process,

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- ✓ identify possible funding to move this development forward.
- ❖ Discussions with the relevant national agencies for SOCRATES GRUNDTVIG in regard to the piloting of this new transnational model, which must involve at least three EU member states and/or accession countries.
- ❖ Piloting, review and adaptation of the transnational pilot

### Case Study: User Needs: The Lighthouse Access to Opportunity Project,

The Lighthouse Access 2 Opportunity Project was about engaging 'hard to reach', people who are isolated or excluded in any way. The Lighthouse Project itself, has over seven years practical experience of working with communities described as 'disadvantaged', and has spent time getting to know the prospective audience by becoming part of the communities in which it works. All of the programmes and services provided come from the desires of the existing and potential service users. The project asks local people what they want, what interests them and how they prefer to learn. This project had developed in direct response to the participant's requests and needs. The beneficiaries were very much involved on a day to day basis.

Targeting local people who had suffered from some form of discrimination and exclusion from society due to anxiety, trauma, stress-related issues and depression, this project used specially designed short courses, which focused on garden design, art and crafts. Many of those targeted lived in high rise housing with few support facilities.

The project particularly developed confidence building, raised self-esteem, and provided first steps to employment and self-employment possibilities. The project, which had a focus on arts, crafts and gardening, used a combination of practical application, theory and IT facilities to design new gardens and create pieces of art/craftwork, which focussed on the local area and the needs of people from the Black Country. Beneficiaries were encouraged to continue visiting the centre when they had completed their course, to work on their own projects. Art and crafts made were sold through the centre's own "market stall" and at organised events such as the Victorian Market which took place in Halesowen.

Project marketing, networking and outreach activities reflected the diversity within the local community. For example, the project worked with the Jobcentre Plus disability officer to widen participation and improve access to service provision for people with a wide range of disabilities. Local flexible access was key to success, using staff who understood the client groups and their needs. Working one to one, supporting each beneficiary was of paramount importance. The Lighthouse employed a qualified Information Advice and Guidance (IAG) officer and holds the National Matrix standard for IAG provision. All participants of the programme had easy access to an IAG officer on the premises.

Potential for further collaboration included:

- ❖ The project would be interested in investigating exchanges for trainers and beneficiaries, undertaking placements to develop additional art/craft skills from another country, using their traditional craft making expertise. E.g. ceramics/cork crafts in Portugal.
- ❖ The project would also welcome being part of a multinational trades/crafts/arts fair such as the "festa" in Spain, and in participating in a Learning Virtual Sauna transnational meeting by providing their own arts and crafts through setting up their own market stall.

### (v) Import/export of new approaches

The Walsall Development Partnership members, and project staff had participated in transnational visits. Capturing the Past also invited one beneficiary to the meeting in Sweden in September 2004. Projects, which had participated, had identified possible further collaboration, but there had been no structure within Learning Kitchen to take these forward.

Capturing the Past saw potential with the Swedish Learning Centres based in library environments, The Community Arts Antena project in developing transnational arts based exchanges for staff and beneficiaries with the Swedish arts schools. Central support is and

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would be needed for any of this to happen, both in terms of accessing funding, but also to ensure the work is shared wider than the individual projects.

EQUAL has enabled the Antena project to undertake valuable pilot activity with a new target group for Community Arts and test out models of working using the arts as a tool. Transnational partners as part of the "edutainment" agenda examined the art process around social inclusion agendas. There were clear links into a Swedish schools approach (within the KOA network), which was using the arts as a hook. Partnership with this school would be worth investigating and developing further through programmes such as Leonardo da Vinci and Socrates.

Equal Pathways has driven the agenda for beneficiary involvement as part of the User Needs group, and with support from the Motivation and Engagement group, which resulted in beneficiaries from all Learning Kitchen projects being part of a visit to Brussels in November 2004, where they met with MEPs. Twenty-three beneficiaries participated on this visit, five from Equal Pathways.

EQUAL Learning Kitchen has identified that the Swedish model of having small very comfortable venues for beneficiaries, where they feel relaxed and safe is something that could be replicated easily in the Black Country. These venues in Sweden worked well in attracting beneficiaries into learning. Walsall

### 3.2 Impact on COESIS

The Portuguese Development Partnership "COESIS" had the smallest resource for transnational co-operation of all the Learning Virtual Sauna partners. In addition, their Action 2 contract covered a shorter time period, initially May 2003 to September 2004, although this was extended to December 2004 in October 2004. These factors immediately disadvantaged them in terms of the results of the early lack of direction and leadership from within the transnational management processes, with too little time to respond in September 2004 when more focussed work plans were developed as the result of the meeting in Sweden. Staff turnover within COESIS did not help the process, resulting in a lack of continuity in terms of delivery of transnational (and national) objectives.

The COESIS Development Partnership stated that they felt there was very little real value to them from the transnational activity, for all the reasons cited above. This was reiterated at project level by each of the project managers, other than the self-development of the individual participants of the transnational meetings. COESIS felt that the transnational co-operation agreement had not been fulfilled, and was over ambitious expecting too much from people who already had a full time job in delivering the national objectives of their EQUAL project.

One major complaint, was lack of communication between the partners in the periods outside of the transnational meetings. Lack of leadership and direction by the UK Learning Kitchen, designated in the TCA to undertake this role was also a major factor, which once again was the result of so many changes in the staff structures. COESIS believed there was a lack of knowledge within the whole Virtual Sauna network, of the requirements of transnational activity, which was why robust structures, systems and processes were not put in place. Finally, the COESIS Development Partnership felt that there was a lack of focus in the theme group activity, with no identified and clear outputs.

#### (i) COESIS, the national project and identified good practice.

Of all three national projects, the COESIS project was the most innovative in the way it addressed the use of ICT to overcome both physical and pedagogical barriers in accessing learning. The project developed the COESIS "portal" through which a range of learning opportunities could be accessed. The project also interfaced the learning process with the addressing of individual needs. The four themes (User Needs, Motivation and Engagement, Learning Environment and Learning Ambassadors) all focussed on the delivery of learning to socially disadvantaged client groups, including those suffering from rural isolation, from

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physical and learning disabilities, long term unemployment and living urban areas of deprivation.

**(ii) User Needs** – focussed on ensuring those using the portal could overcome their personal as well as physical barriers in terms of accessing learning and preparing for employment. Content for the portal was discussed with potential users, to ensure it met their needs, resulting in modules on:

- Learning
- Solving
- Citizenship
- Having fun
- Employment
- Information

The technical staff had the greatest difficulty in balancing users' needs for "simple" access to the IT, but based on a sound pedagogical process which met user needs, with the complexity of the software and IT development needed to deliver this. The Development Partnership must be applauded in their success in achieving this, evidenced by the demand for access to the portal and all its resources.

Users in this project, also include the Learning Ambassadors who are the support arm for beneficiaries, in ensuring successful access to the portal and the most relevant content for each individual. Learning Ambassadors were unemployed graduates, who had not been able to access employment, and needed to access training content to empower them into becoming effective Learning Ambassadors.

Each beneficiaries learning is mapped against a Certificate of Competencies, which is equivalent to a formal qualification at school level, which also meets a user's needs to have a qualification, where they failed within the formal education system.

Recognising the value of this content, and how successful the portal has been, is the key to its success in being sustained beyond the life of EQUAL. In the centres in both Gaia and Oporto, the use of the portal has been integrated into more formal vocational learning programmes, so that it is used as part of the learning offered. Trainers have also used the Learning Ambassador programme on the portal to teach themselves how best to use the portal for their learners.

**(Refer to Annex 0 for the COESIS home page)**

**(iii) Motivation and Engagement** – ICT was seen as the "hook" for beneficiaries, as in Portugal it catches the attention of the public. Access to the internet without a charge was also a hook, and the support of the Learning Ambassadors was crucial to retain their motivation and interest.

A group of long term unemployed people were attending the work shop in Gaia to gain skills and access information which would help them to access employment. The portal provides information on where to find paid work, how to produce CVs, letters of application, examples of resumes. Feedback from these beneficiaries confirmed that using the portal was not only a more interesting way of doing this compared to more traditional routes through employment services, it was more dynamic, interactive, person centred. Both Anibal and Marisa said the portal was easy to use, and helped develop their ICT skills too.

**(iv) Learning Ambassadors** – recruitment of unemployed graduates with relevant degrees to paid posts as Learning Ambassadors, was the model within the COESIS project. This approach built on the already successful positions of the "social ambassador", a more care focussed support role for people suffering from disadvantage, particularly those with disabilities. Learning Ambassadors were the support to be provided in the workshop environments, where beneficiaries accessed the portal.

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The centre in Gaia, had an undergraduate on placement as a “volunteer” Learning Ambassador. She had chosen the centre for her placement as part of her five-year degree programme, to become an educational psychologist. Her specific interest was to work with people with disabilities, and her message as to the value of this project was that for the first time in her five years of learning, she recognised that the person was more important than the disability. She had seen their individual abilities in accessing and using the portal and their need to learn, which she had never experienced before and had not thought possible.

**(v) Learning Environment** – there is only one environment within the COESIS project, a supported virtual environment, the COESIS “portal”.

### ICT in Communities, good practice from Portugal

The COESIS Equal project aimed to develop ICT communities to support disadvantaged people in accessing learning (formal, in formal, and non-formal) and employment. As a result, working with a private sector IT technical company they developed the COESIS portal. The technicians were asked for a simple system, which would allow anyone with or without IT skills to access the information they needed at that point in their lives. The company believed that this was ambitious, but worked with the partners in the COESIS project to interface their pedagogical approach with the technical framework.

The basis of this development was the belief that the interest in ICT would bring people into learning, and that ICT was indeed a “hook”. Interviews with beneficiaries in three of the centres where the portal can be accessed has confirmed that this is correct. Beneficiaries from a variety of backgrounds said that they preferred to learn and access employment using the portal and ICT to traditional methodologies. Reasons given were accessibility through drop in, being able to interact with others in the centre with similar experiences and backgrounds, using e mail to communicate with friends, family and colleagues also using the portal, accessing so much information which helps with their lives on a personal basis as well as in terms of training and employment.

ICT has reduced the isolation felt by many of these learners whether they are from the industrial centre of Oporto, or the rural area of Bragança. One beneficiary from Bragança, a man who had been injured at work and is now wheelchair bound stated that the portal had helped him live again. He has a personal interest in wildlife and nature and access to the portal and the internet has opened up a new world for him. He also said he felt useful again, as he could help others at the centre less able than him to use the portal. He was also interested in being able to share his love of the environment and wildlife with others.

Isabelle, also using the portal in Bragança suffers from cerebral palsy. She is independent at home but still needs parental support. Isabelle would love to attend the ICT centre in Bragança more regularly, as would most of the beneficiaries. Logistics in an extremely rural area, where the villages are isolated from Bragança relies on the ASCUDT, the provider to use a minibus to bring beneficiaries in from these villages, which are located in the mountains. The centre for her opens up a world, which she would never otherwise be able to experience. When not in the centre she is confined to the house.

Another beneficiary from Bragança had been a hairdresser, but with an illness leaving her with visual impairment is now not able to work in this profession. The centre gives her an opportunity to continue learning, develop new skills including ICT but also empowers her to help others at the centre.

All the beneficiaries believe that the support of the Learning Ambassadors in the centres on Oporto and Bragança are important in enabling them to access the portal and develop new skills. It is obvious from the evaluation visits how close relationships are between the learners and the Learning Ambassadors. A psychology undergraduate on placement at the CPRG centre in Vila Gaia stated that the experience of what she has seen has made her reflect on how she had previously thought about people with disabilities, which was the area of special interest she was studying. She now understood that it was more important to see the person rather than the disability, and the portal had shown how people with disabilities could learn and progress towards independence.

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A comprehensive report on the COESIS Virtual Learning Environment is attached at **ANNEX P**

### **(vi) Exchange of Experience and potential for further collaboration**

The COESIS Development Partnership believed that the one positive outcome from the transnational activity was the learning as a result of the sharing of experience and ideas. New ideas opened new ways for COESIS. A presentation on “Accelerated Learning” at the first Black Country Knowledge Society Conference in the UK (February 2004), resulted in the development of a model within the COESIS project, based on the ideas shared. The COESIS “portal” was revised to reflect this learning, developed to appeal to the visual and hearing senses, which had not initially been considered by the developers.

- An on-line learning session with one of the Swedish partners has led to a new concept in the development of e-learning resources for COESIS, evaluated by the COESIS Development Partnership. However, to take this further, it needs the investment of further resources. This could result in building “standardised” content, meeting agreed Quality Assurance frameworks. COESIS has submitted an application to the European Commission for the development of e-content, which if approved would enable this work to be taken further with Sweden.
- The portal includes a chat room and e-mail facility for beneficiaries to use the portal to communicate with family, friends and other portal users. Beneficiaries can raise issues and ask questions of each other as well as sharing ideas and learning. Such communication channels have been key in reducing isolation. Kevin, the beneficiary from the Wolverhampton Learning Kitchen Equal Pathways project wants to set something up similar to this to complement his social activities and events targeting people with/recovering from disabilities, and would be keen to do this with the transnational partners. Funding through Socrates and/or Youth could be available to support the continued development of this initiative.
- The Learning Ambassador training programme in Portugal is developed and available on the portal. With more investment in this development on a transnational level, the original aim within the TCA could be achieved, a transnational Learning Ambassador training programme, supported by a mobility (exchanges and placements) programme for trained and trainee Learning Ambassadors from each partner country.

### **3.3 Impact on KISTA Open Academy (KOA)**

The Kista Open Academy (KOA) project was immediately disadvantaged when the Swedish national agency reduced the total funding package by 50%. This resulted in the project not being able to develop and pilot the project, but only develop the networks for delivery and use these networks to influence policy and decision makers at regional and national levels.

#### **(i) KOA the national project and identified good practice.**

The idea of the project was to change the system and the regulations in Sweden, to enable non-traditional adult learners to access higher learning without the required formal qualifications and competencies.

#### **Consultation and empowerment**

Even at this stage, good practice has been identified through the pre EQUAL consultation process, which involved a conference for beneficiaries, politicians, and the statutory agencies at local and regional level and local people to explore together the Finnish flexible learning model. As a result, there was a high level of demand to find out more about this model, and so a study visit to the Finnish University was organised, which included staff from the local municipalities as well as politicians.

As a result of this activity an Action 1 proposal followed by an Action 2 was submitted. The initial proposal intending to:

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- Set up new learning centres, based on good practice, which existed in Sweden with national networks of flexible and open learning centres, but focussed in communities where these did not already exist. This included new centres within many of the ethnic population communities including those, which supported refugees and asylum seekers.
- Course development and “modularisation” of learning
- Analysis and research into obstacles and barriers
- Piloting of the model with the target groups
- Review and further start ups as a result of the learning from the pilots.

The aim was to build on the already successful learning centres, through which many adult learners are currently supported and continue the work of matching each learner’s skills to their aspirations. These centres offer a meeting place as well being learning centres, and visits to these have impacted positively on the Learning Kitchen partners. KOA aimed to link what were still isolated initiatives for adult learners into a formal network, each learning centre becoming a one stop shop for access to all their learning needs from secondary to higher level. The aim had been to develop some higher level e-learning resources for the piloting phase.

KOA also wanted to further develop the adult information, advice and careers guidance services, where currently in Stockholm, there is only one guidance worker to 40,000 adults.

### (ii) Exchange of Experiences

As a result of the funding cuts, only the development of the networks, some capacity building within the target communities through the sharing of good practice and the research and lobbying could take place. KOA was very disappointed with this, as it felt that they could not work on a transnational basis with the partners from Portugal and the UK. However, they overcame these issues by:

- Showcasing good practice, which already existed in Sweden, which was complementary to the activity being developed in both Portugal and the UK through their national EQUAL projects. An example of this can be seen from the report produced from the project visits, which took place in Sweden attached at **Annex Q**. As a result of these project visits, the potential for opportunities to collaborate became more obvious to the other partners. This made all the partners realise that this type of activity should have been included within the transnational co-operation at a much earlier time. **These visits have resulted in:**
- ❖ Joint piloting between the Learning Kitchen Capturing the Past autobiography resources within one of the learning centres supporting ethnic minority learners.
- ❖ The Portuguese partners investigating how learning resources for e learning can be developed against a quality assurance framework, to help standardise production of resources.
- Ensuring that their partners within their Development Partnership were involved in all transnational activity as part of the capacity building work being undertaken as part of Action 2. The aim was to help these organisations, particularly those involved with the ethnic communities, develop an understanding of how similar issues they were facing were being addressed in other countries. This has resulted in a small pilot for Learning Ambassadors now being set up with the extra funding allocated from EQUAL in December 2004, within the ethnic community organisations.

### (iii) Learning Ambassadors

**The aim was to use Learning Ambassadors to support access into learning for these groups, replicating the Portuguese model of being paid a (small) salary and the UK model of using the beneficiary target group as Learning Ambassadors.**

**KOA's main goal was to try to adopt a "Learning Ambassadors" programme, based on methods used in partnerships in the UK and Portugal.** KOA received an extension of their project to increase the dissemination and to undertake a pilot project within in the local partner immigrant associations all wishing to implement a Learning Ambassadors programme. There are four associations as members within in the local development partnership. They are:

Iranian Association, Stockholm County  
The Co-operation Group for Iranian Associations in Sweden (IFR)  
The Eritrean Association, Kista/Husby  
The Kurdish National Association

The main target groups for the Learning Ambassadors are the members in the associations and the task was to find out if it was possible to develop a Swedish methodology for a Learning Ambassadors programme which could be adapted to meet the needs of these target groups.

Each group received 6500 Euro to cover their costs and to be able to pay a small fee to the person they chose to do the job of a Learning Ambassador. The ambassadors received one day of education and training supported with a guidance councillor.

The first learning experience was that the demands and prerequisites in the target groups were very different resulting in all the associations being free to create their own model. Each model is described below:

**The Iranian Association, Stockholm County**, was a very divided organisation. Their members were not so highly educated and many of them were unemployed. A large group were also young people, the second generation in Sweden of which many had already dropped out of school and were now in difficult circumstances within the labour market. This organisation were not able to fulfil the complete task but just undertook the first steps to inform and build up a network between all the partners within their organisation.

**The Co-operation Group for Iranian Associations in Sweden (IFR)** started up very quickly. They contacted the labour market office for unemployed people and got support and will now add their money to money from this office. This is an excellent example of how an organisation can be empowered to draw down additional funds from the investment of an initial small sum. They have one person employed full time. The members are highly educated and their difficulties are around the levels of their employment. Many of their highly educated members are driving taxis or running pizzerias. They have worked hard to match the right people into the right work and to find possibilities for complementary education and training which will give them good better opportunities. They have also worked to find possibilities for work experience.

This project has translated useful information, arranged to open a radio broadcasting centre where members can call them and get answers to their questions and have arranged meetings in their office where they also have courses and other related activities.

**The Eritrean Association, Kista/Husby**, has been very ambitious with their plans. They have translated a lot of relevant material and have arranged many meetings in their office where they have also arranged other related activities.

The demands of the group have been very different from the others. With high rates of unemployment they are isolated from all aspects of society. To be able to take the first steps back into a world of education and training their members needed a lot of life skills development and access to relevant information. These demands have been met by the Learning Ambassador and through inviting representatives from local authorities (e.g. the local social department), and tax experts to provide necessary knowledge in these areas. They have also invited representatives from basic skills training organisations and guidance councillors. They have very practically supported families with difficult social problems (e.g. drug problems with their young people) and they have made a great success of their work. They have also opened a radio broadcasting station.

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**The Kurdish National Association** also has a divided structure, which makes it more difficult to develop a model, which will work and to agree conditions. The project has been up and down and it is difficult to know what the final results will be.

This is the situation at the end of the pilot projects. KOA has at least two really interesting and successful results where many people have been involved, been hooked into learning and training and received support and more knowledge for their future. There are ideas that can be developed further and may be KOA can find and further develop an adapted model a divided for Swedish Learning Ambassadors. KOA is awaiting the final reports from each association, which will then be analysed, reviewed and the results evaluated. The final results will be disseminated into the local municipalities.

### (iv) Influencing change

Excellent good practice has evolved from what seemed to be a weak starting point.

- KOA as a project has developed an excellent model of **“hearings”**, which bring together all those responsible for learning within the Swedish segmented learning market, with those delivering learning. The aim of these “hearings” was to lobby for a more co-ordinated approach not just to the delivery of learning for adults including access to higher level learning, but also a rationalising of the funding streams. Currently these do not follow the learners and their needs, but are restricted within the sectors of education, primary, secondary, higher and adult learning, with cross over of resources between sectors not allowed. The hearings were also used to lobby for moving away from formally recognised qualifications and competencies for non-traditional adult learners to access higher level training. These hearings have reached to the highest levels of government, drawing in commitment from civil servants and politicians as well as universities, the national network learning centres, local municipalities and the beneficiaries themselves. (refer to Annex N)
- Working within such a powerful Development Partnership (of 27 partners) and focussing on “capacity building” activities, as developed a new and unplanned role for KOA, as **“change agents”**. In many ways, this is what EQUAL is about, the use of the learning from EQUAL activity to influence policy and decision making within the education, training, employment and labour market infrastructures at local, regional, national and transnational levels. Positive results have been achieved by KOA as highlighted above, but the most exciting has been the way that mainstreaming and sustainability has taken place, almost without being recognised by the partnership.
- ❖ Stockholm Municipality has set up five new learning centres using their own mainstream funding as a result of their learning through this project. The aim has been to provide better quality learning for adults in order to improve their skills and access employment. As a result of this, other municipalities are also investigating this model.
- ❖ The hearings are a major force of change within the both the higher education and adult learning sectors in Sweden. Using the model of “hearings”, and bringing together beneficiaries, practitioners and policy and decision makers has impacted positively on the way all the stakeholders are viewing access to and delivery of learning to adults.

### **KOA and hearings one and two, a case study on “influencing policy”**

Kista Open Academy’s main aim has been to realise an Open University, through the development of a strong network of change agents in Sweden. To be able to start the process KOA has been building networks with key stakeholders from universities, learning centres, local municipalities, and government identifying the barriers and obstacles within adult learning structures. KOA has also produced and delivered a dissemination strategy involving major policy and decision-making organisations and actors responsible for this area of work.

A major part of this strategy has been to invite a broad range of people from universities and authorities to two “Hearings”. The first one had the theme: “The collaboration between universities and the society” and the second: “An Open University for all adults”. The main

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target group for the first Hearing was the universities and it was a success. Some of the Universities and Colleges presented their excellent collaboration and it showed the possibilities and also the obstacles and the barriers faced by non traditional adult learners, which KOA had already identified within their EQUAL partnership. The main target groups for the second Hearing were the national authorities and politicians and KOA was fortunate to be able to involve in this hearing key dignitaries.

The first hearing opened up the dialogue. Organisations were interested and many of the universities started to collaborate to contact the authorities with the aim to strengthen their own work. The second Hearing was also very successful. KOA arranged a seminar in May 2005 together with NTG-Learn involving support from transnational partners within the Learning Sauna Network, from the Finnish Open University and from London Open University.

After involving NTG-Learn in action three of EQUAL at a national level, the process has moved very quickly. Working together at a national level is more powerful and gains much more attention. KOA has also formally received support from ten large organisations and authorities. A proposal for an official letter has just been produced and will now be signed and sent to the Ministry of Education and the Ministry of Labour. The message has already been recognised by them and KOA knows that they are now very positive to undertake changes in both the system and the regulations governing adult learning in Sweden.

The official letter will be translated into English and provided to the Learning Sauna partnership.

Potential for further collaboration includes:

- The model of the hearings as real potential for sharing within this and other partnerships at local, regional, national and transnational levels. This is what EQUAL aimed to do, and what has not been as successful as it should have been in many of the EQUAL partnerships. Questions have to be asked on the basis of learning from this, as to what the real value of EQUAL can be, within the existing framework of EQUAL. If too much emphasis is placed on the piloting, does the issue of mainstreaming and sustainability get pushed out? What would be interesting piece of research for the European Commission, is to identify all the successful models piloted, analyse how many were successfully mainstreamed and impacted on changes in structures at the appropriate level. For round 2, there is no doubt much more investment is needed much earlier on within the EQUAL delivery period to improve on this very important area of work. What the model in Sweden has proven, is that to ensure real change, it is those at national level, which have to be persuaded to support change. Local and regional agencies use "national policy", as an excuse not to invest in change and much good practice is lost.
- The Swedish model of networked Learning centres, where learners can access a range of providers' resources is interesting. In the UK the nearest model is Learn Direct, but this is not as comprehensive as the Swedish model. Learners in the UK are restricted to Learn Direct resources, which in some cases meet the learner's needs, but in other instances falls well below the standard needed. Models, which do work in the UK, are where Learn Direct centres are located in learning centres which offer wider e learning resources or access to additional activities so providing greater choice, but these are not available outside of this centre. The national networking is the key, with the standardisation of production against a quality framework. The Portuguese COESIS partners have recognised this potential.

## 4.0 Recommendations from the learning process.

### 4.1 Leadership and Management

To gain even greater impact in the future, the management of the transnational programme must be much stronger, be more focussed with greater understanding of what is expected

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from this part of EQUAL by all the stakeholders including projects and beneficiaries at national and transnational levels.

All stakeholders must be involved in the development of the transnational co-operation agreement.

A post needs to be created for the development, co-ordination and implementation of transnational activity to ensure continuity between transnational meetings. This post would be the “transnational communications hub” through which all partners would work to pass on and share information. Such a post would enable information received to be input onto the project web site, and would monitor the quality and update the information as was required. The post would ensure effective collaboration continues in between transnational activity to ensure that TCA objectives and outputs can be achieved.

Clear objectives and targets should be set, not just for the overall transnational programme within the TCA, but also for the justification of each visit and who should participate. Clear review processes must be put in place to ensure learning from these visits and activities can be formally recognised and utilised at beneficiary, project and management levels. Objectives for transnational visits must be “fit for purpose” and support the development of local and regional strategies, adding value to what is already happening on the ground.

More formal feedback processes need to be built into the activity plans to maximise on the learning potential. Feedback processes need to interface with management and policy meetings within the wider organisation and partnership, so that the value of working at transnational level is transparent, and can incorporate feedback from strategic decision making bodies.

Budgets should be delegated to “project leaders”, within financial regulations and tied to deliverables, to empower projects to develop joint initiatives and resources.

Only with this type of approach, will the real added value of working at transnational level impact at beneficiary, project, local and regional levels. Management processes within the Black Country and the COESIS partnership have neglected the learning and results from the transnational activity, in terms of fully utilising the potential of transnational collaboration. In Sweden, this has been more effective in that the focus of the project was to activate “change” at policy level, so information could be more easily used and assimilated into this type of project. Sweden did not have the dual emphasis related to piloting with beneficiaries as well as influencing change, as did both the Black Country and Portugal.

### 4.2 Hints, tips and guidance for the future

- **Production of the Transnational Co-operation Agreement (TCA)**
  - ✓ Obtain project summaries and national objectives from each prospective partner
  - ✓ Appoint a partner to produce the first draft of the agreement
  - ✓ Involve all stakeholders in the development of the agreement, including where possible target beneficiaries
  - ✓ Establish principles of mutual respect and equal participation in decision making from the outset, at national and transnational levels.
  - ✓ Recognise and address differing levels of expertise
  - ✓ Provide induction to transnational work at national and transnational levels as appropriate
  - ✓ Find out about and respect differing levels of funding and researching across the partnership
  - ✓ Arrange meetings at national and transnational levels to agree content, objectives, deliverables, budgets, documentation to be used and time frames.
  - ✓ Ensure transnational co-operation plan is achievable and not over ambitious
  - ✓ Appoint a paid transnational co-ordinator to take responsibility for the support of the delivery of the TCA, and to act as the co-ordinator for all aspects of the TCA.
- **Managing the Transnational Network**

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- ✓ Use each national DP and project management meeting to report on the work being undertaken in the transnational partnership
  - ✓ Agree communications strategy and action plan, use of web sites to support this
  - ✓ Produce a transnational dissemination strategy and action plan
  - ✓ Agree transnational project management meetings schedule, keep separate from development meetings
  - ✓ Link transnational meetings where possible to a dissemination/mainstreaming activity
  - ✓ Be flexible
  - ✓ Agree central secretariat for transnational partnership
  - ✓ Agree hosting, payment, funding protocols
  - ✓ Agree basic standing agenda for each transnational project management meeting
  - ✓ Identify tasks and allocate responsibility with delegated budgets for this activity
  - ✓ Arrange bi-lateral and multi-lateral meetings as required for project staff to develop joint products, resources and set up exchanges for staff and beneficiaries
  - ✓ Involve beneficiaries in transnational project management meetings as appropriate.
  - ✓ Involve local partners and include in visits
  - ✓ Provide interpretation as required, but particularly at meetings where decisions are being made.
  - ✓ Be aware of the time that interpretation takes up when planning the meeting agenda
  - ✓ Ensure all visits are authorised by senior managers, with budget, purpose, objectives, results from visits identified, and how these are to be shared on return.
- **Evaluation and Dissemination**
    - ✓ Agree transnational evaluation strategy and action plan for all three actions
    - ✓ Involve external evaluation as early as possible
    - ✓ Involve all partners and stakeholders in agreement on performance indicators, outputs and results to be achieved.
    - ✓ Evaluate overall impact in addition to delivery of agreed outputs
    - ✓ Use evaluation data to support dissemination
    - ✓ Produce a transnational dissemination strategy and action plan, which realistic and achievable
    - ✓ Deliver joint dissemination activities, which are genuinely transnational
    - ✓ Integrate dissemination and evaluation activities into mainstreaming and sustainability action plans.
- **Key principles for successful transnational collaboration**
    - ✓ Flexibility
    - ✓ Open and honest communications
    - ✓ Electronic and written communications must be used to the full, but cannot replace face to face contact.
    - ✓ Use social activity and transnational meals to build trust and lead to open and honest exchange
    - ✓ Ensure continuity of attendees at key decision making meetings, and within development groups
    - ✓ Split development tasks from management processes
    - ✓ Provide and update all contacts
    - ✓ Review, review, review against the Plan
    - ✓ **Remember doing things differently does not mean this is doing them wrong.**
- **Identify added value of transnational partnership activity**
    - ✓ Lessons learned to be documented – project and process
    - ✓ Continuously review and revisit what has been learned
    - ✓ Outputs to be documented
    - ✓ Learning by staff, volunteers and beneficiaries to be formally “logged” and recognised in partner institution staff development frameworks, and where possible linked to national standards (such as accreditation processes)

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- ✓ Record impact of transnational actions at national and transnational levels
- ✓ Keep track of statistical data
- ✓ Always work to identify new opportunities for continued co-operation

## 5.0 Concluding Remarks

Learning Virtual Sauna has been a test bed for learning at all levels. Most learning has taken place within the individual partner organisations from each national Development Partnership. The GHK findings from ADAPT and EMPLOYMENT have been repeated here, in that the partnership by the end of the contract period are in a much better position to deliver the outputs of the TCA. The partnership has been empowered to continue to deliver new joint initiatives, which could have real benefit at national and local levels if funding could be secured.

The partnership has delivered some excellent results and these should be recognised for their outstanding value. Often, these are forgotten or not even seen by the partnership for what they are, as time is spent in dealing with the issues and in the detail of delivery at local level. This does question the real value of the investment of resources into the influencing process, as has been identified with KOA and the Swedish model. This project shows that to influence change at policy level, this work must begin at the start, should be seen of equal importance as the test bed pilots, and engage with stakeholders at all levels.

Much more guidance is needed from EQUAL in this area of activity, and action 3 activities approved should be revisited to identify models from across Europe, which may have impacted as intended, and disseminate these to Round 2 EQUAL projects. Similarly, further evaluation at European level should also investigate if funding provided at each national level is the best way of creating added value from transnational work. Comparing EQUAL as a funding model to Article 6 and/or Leonardo da Vinci transnational activity in terms of success in delivering transnational objectives could highlight reasons why EQUAL and past community initiatives have not achieved their full potential. Or is it just a leadership and management issue?

It has been the aim of this report to give **equal time and importance** to both success and weakness, the latter often seen as failure rather than the positive learning, which has taken place.

Learning Virtual Sauna should celebrate their achievement and their learning.

## 6.0 Recommendations

**To note and accept this report.**