



European Commission Socrates R3L Programme

A STAKEHOLDER AUDIT

UNIVERSITIES

Short version

A tool to enable universities to analyse and respond to a changing educational world in which lifelong learning is predominant and cities regions are in the process of becoming 'Learning Cities' and 'Learning Regions'

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Introduction to the Stakeholder Audit for Universities (short version)

The R3L programme

'Learning Cities', 'Learning Regions', 'Learning Organisations' are terms that are increasingly used to describe the rationale for the transformation of European cities, towns, regions and organisations for a knowledge age. The European Commission therefore funded, under the title R3L, 17 interlinked projects that will develop a deeper understanding of the practical benefits of lifelong learning in municipalities and regions throughout the continent. The European Commission definition of a learning region is as follows:

'A learning city, town or region recognises and understands the key role of learning in the development of basic prosperity, social stability and personal fulfilment, and mobilises all its human, physical and financial resources creatively and sensitively to develop the full human potential of all its citizens'

Such a definition implies that all sectors of a local community are 'stakeholders' in the construction of a mutually advantageous and interactive learning city, town or region that will deliver prosperity, social stability and the personal well-being of its citizens. Universities in particular have a crucial role to play in learning region development, particularly in view of the recommendations of Bologna 'Third Mission' .

The Indicators project

This was one of the most important of those projects. In it, a group of experienced partners from 5 European countries is constructing ' stakeholder audits' to help public and private institutions measure their performance and progress toward becoming 'lifelong learning organisations' within a 'learning region.' The 5 audits are written for schools, universities, small companies, adult education colleges and for local and regional authority administrations. They are completely comprehensive in nature covering a wide variety of internal and external lifelong learning indicators, based on the recommendations and results of research, reports, papers, projects and books written on the subject over a period of years.

A Stakeholder Audit

The audit itself is not simply a questionnaire. It is a carefully-worded instrument to engage the stakeholder in debate with itself about its own future as a quality learning organisation, and its relationship to others in the city/region and beyond. The lifelong learning rationale is embedded in each action element of the audit tool, in order to help stakeholder management and staff understand what a lifelong learning organisation within its sector will be like and how it can make that transformation.

Institutions become closely involved with the transformation process through questions soliciting opinions, information and comment, and exercises developing internal and external debate. The 'stakeholder audit' tool we have created for universities therefore has five purposes, all of which are connected with meeting these criteria in a learning region:

- It will enable universities to measure their performance as 'learning organisations' within a learning region.
- It will explore all the parameters which enable a modern university to address the vast number of changing needs and demands of a 21st century lifelong learning society.
- It will examine the role of the university in the construction of a learning region to which it can contribute and from which it can benefit.
- It will act as a basis for comparisons with universities in other regions
- It will stimulate discussion and debate among staff and students on future directions and roles.

We have tried to make the University Audit both flexible and useful by dividing it into sections dealing with different aspects of the institution's operations. **Please note that this is a tool and not just a questionnaire. Please note too that this is the short version.** Its purpose is to stimulate thinking, debate and a determination to take action. There is also a longer version to help universities to effect the transition to a full Learning Organisation, within a Learning Region. This transition affects all parts of the administration, often in quite fundamental ways, and the change process it will engender will take months and years.

Whichever way you may wish to use it, we believe that you will benefit.

Part 1 – Before we start let’s find out some facts about your university and the city in which it is situated. Please answer the following general questions.

1.1 Your location

1.1.1	City Name	
1.1.2	Population	
1.1.3	Number of Higher Education Establishments in the city	
1.1.4	No of Further Education Colleges in the City	
1.1.5	No of Schools in the City	
1.1.6	Name of the wider region in which the city is situated	

1.2 Your University

1.2.1	University name	
1.2.2	University Address	
1.2.3	Telephone number	
1.2.4	Fax Number	
1.2.5	WWW address	
	No of full-time students	
	No of part-time students	
1.2.6	No of staff	
1.2.7	Public or privately funded	

1.3 Courses Offered (Yes/no)

1.3.1	Doctoral Programmes	
1.3.2	Post-graduate programmes to Masters level	
1.3.3	3/4 year Undergraduate Degree Programmes	
1.3.4	Sub Degree Accredited Programmes, ie. Certificate/Diploma	
1.3.5	Non-degree/diploma Adult Education programmes	
1.3.6	Other - please specify	

1.4 Respondent

1.4.1	Name of respondent	
1.4.2	Email address of respondent	

Part 2 Your Existing Institutional Commitment to Lifelong Learning

Universities are increasingly stating that they are committed to the concepts of lifelong learning and implementing them into their courses and curricula. In part 2 we are exploring together the understanding of lifelong learning principles and the strategies and actions already taken to put them into practice within your University.

2.1 How far does your university management agree with the sentiments expressed in the following statements

- 1= crucial to the future development of the university
- 2= very important – implementable strategy now in place
- 3= important enough to warrant the development of a strategy
- 4= interesting but not important enough to warrant strategy development
- 5= Not relevant

		1	2	3	4	5
2.1.1	Education is a service supplied to students, society and business. Like any service, its quality should be constantly evaluated and updated. Continuous quality improvement of education should be a standard part of educational planning at every institute, in all levels of education. Korhonen: Challenges of Higher Education in Finland					

2.2 Lifelong Learning Strategy

A University committed to Lifelong Learning will have a strategy to monitor its implementation. The following questions explore the existence of a strategy and its development. If you believe that any item is not relevant to your university please tick the last column (NR= Not relevant).

		Yes	No	In plan	NR
2.2.1	Does your University formally call itself a Lifelong Learning University?				
2.2.1.1	If yes, is it incorporated in the University's strategic plan				
2.2.1.2	If yes, is the plan freely available to Staff				
2.2.1.3	If yes, is the plan freely available to students				
2.2.1.4	If yes, is the plan freely available to the general public				
2.2.2	Does your University have a Senior officer responsible for ensuring that Lifelong Learning concepts are implemented				
	If yes please give this person's title and the title of the officer to whom they report in the boxes below				
2.2.2.1					
2.2.2.2					
2.2.3	Which of the following were/are involved in drafting the strategy?				
2.2.3.1	All Staff				
2.2.3.2	Senior Officers				
2.2.3.3	Students				
2.2.3.4	Governors				
2.2.3.5	People from local business and industry				
2.2.3.6	People from the Local Authority				
2.2.4	Has your strategy been discussed and approved by your University's Governing Authority/Senate				

2.2.5 Please write in the box below any other comment we need to discuss together about the development of the university's strategy for lifelong learning eg explain why you think something is not relevant.

2.4 Membership of Lifelong Learning Organisations and European Projects

In this section we exploring together the university's membership of, and participation in, external lifelong learning programmes and projects

		Yes	No	In plan
2.4.1	Does your University belong to a national organisation promoting lifelong learning?			
2.4.1.1	If yes, please say which ones in the boxes below			
2.4.2	Does your University participate in European/National Projects specifically to promote or develop Lifelong Learning			
2.4.2.1	If yes, please tick which Programmes			
2.4.2.2	Socrates			
2.4.2.3	Leonardo			
2.4.2.4	Framework (research)			
2.4.2.5	Esprit			
2.4.2.6	Info Society			
2.4.2.7	European Social Fund Project(s)			
2.4.2.8	European Development Fund Project(s)			
2.4.2.9	National Project(s)			
2.4.2.10	Other (please say)			
2.4.3	Does the university belong to an international organisation promoting lifelong learning?			
	If yes, please say which ones			

2.4.4 Please insert any comments you may wish to discuss with us about the university's involvement in external projects and associations

2.5 The University as Learning Organisation

'The knowledge society of the 21st century will discover that learning is the source of wealth, welfare and competitive advantage. We are experiencing a paradigm shift. The evidence suggests that the development of learning organisations is not merely desirable, but essential to the survival of companies in the next century. This is a challenge faced not only by business and industry, but also by not-for-profit organisations in the voluntary and educational sectors. Schools, colleges and universities also need to be learning organisations, if they are to prosper.' (Sir Christopher Ball – Action Agenda for Lifelong Learning (ELLI))

In this section we are exploring together the way in which the University is becoming a 'Learning Organisation' within the accepted meaning of the term. Although applied mainly to companies, it's use is rapidly spreading to other organisations.

A thumb-nail definition of a University as a 'Learning Organisation' might be 'an organisation which understands how learning throughout life is the key to survival in the future and pro-actively puts every learner's needs and requirements at the forefront of its strategies and policies and provides the support structures to enable staff and students to develop their full potential'

		0-5%	6-15%	16-30%	31-50%	51-75%	76-100%
2.5.1	To what percentage do you consider your University satisfies this definition overall						

2.5.2 The following are indicators for a Learning Organisation amended to fit the university environment. Please put a mark from 1 to 5 in column A reflecting the extent to which the university considers them to be relevant and in column B the extent to which it practices these ideas internally. (You may wish to give this part of the audit to 3 different people a) a senior officer b) a lecturer and c) a student.

Scoring: 1 = very relevant/implements all this in full 5 = not relevant/has made no effort to

Topic	Description	A	B
1. Management / Leadership	All staff of the university are consulted frequently and fully		
	All students are consulted frequently and fully		
2. Organisational Decision-making	Decisions are made and acted upon at the most appropriate point in each school/faculty/department		
3. Rewards	A sophisticated reward system exists and is applied to all people in the university		
5. Feedback	Feedback on all matters is welcomed, acted upon and always replied to		
6. Grievance Channels	There is a sophisticated confidential system of airing grievances with no come-back to the complainant		
7. Contribution to policy-making	Every staff member is encouraged to contribute to policy-making. Suggestions always replied to.		
	Students are encouraged to participate in policy-making		
8. Continuous Improvement	All staff members have continuous improvement programmes and an implementation plan for these		
	All Students have personal development plans and a plan for implementation		
	Personal learning support structures exist for every student		
12. Use of Learning Technologies	Full use is made of new learning technologies		
15. Time off for Activities	At least 10% of Working time can be taken off for learning and community contribution by staff		
16. Personal development	Personal skills development courses available for all as and when required		
18. Customer Focus	Every staff member has received training on satisfying the customer		
19. Quality	Every staff member has been on a quality improvement course and is constantly trying to improve personal performance		
20. Mission	Everyone has a hand in defining the mission of each department and is given a copy of the mission statement		
21. Strategies	Everyone in the university knows, and acts upon, its strategy for the present and the next five years.		
23. Information-giving	Every effort is made in many different ways to keep all people up to date with events, news, successes, failures, problems, opportunities		
24. Community Contribution	The university encourages and supports every person to contribute to the community		
25. Organisational Culture	Every staff member feels to be a part of it and is eager to contribute to its success		
28. Helping minorities	Has special procedures for actively helping all less fortunate people irrespective of creed, culture, language, handicap, race or nationality		
28. Cooperation with others	Works with other organisations to improve learning in the community		
29. The Environment	Encourages all people to understand and take good care of the city environment		

2.5.3 If you have any further comments that we need to discuss relating to this exercise and its relevance to the university, please put them in the box below

2.5.5 Quality and Standards

Quality is a term much associated with Learning Organisations. Here we explore the university's quality management policy

		yes	No	In plan	NR
2.5.5.1	Does your University have a policy relating to quality?				

2.5.5.2	Does your University actively recommend and facilitate formal feedback from students for each lesson taught?				
2.5.5.2.1	If yes, is it freely available?				
2.5.5.2.2	Is it applied to all departments?				
2.5.5.2.3	Is it part of a national initiative?				
2.5.5.3	Does your University operate an externally validated organisational quality standards policy e.g. ISO 9000, Investors in People Uks?				
2.5.5.4	Each department is subjected to an annual quality review				
2.5.5.5	Does your University have an officer in charge of quality				
2.5.5.5.1	If yes. does each department have a person reporting to him/her				

2.5.6 If you have any comments that we need to discuss regarding incentives, quality and standards at the university and/or the questions that have been asked in part 2, please put them in the box below.

Part 3 Your University & The Community

Although Universities are not paid by the Local Authority Structure, they have a key part to play in the lifelong learning development of the community in which they exist. In this part of the Audit we explore together the developing nature of the relationships between town and gown

3.1 The following is a quotation from a report referring to the university's place vis-à-vis the community it inhabits. Please say to what extent the university management agrees with the ideas expressed in the quotations.

- 1= crucial to the future development of the university
- 2= very important – implementable strategy now in place to address the issue
- 3= important enough to warrant the development of a strategy in the future
- 4= interesting but not important enough to warrant strategy development
- 5= Not very important

		1	2	3	4	5
3.1.1	The mission of the university as place which adopts a leadership role in the local community, serving it and involving its citizens in the research it carries out, would see the community as a huge learning research laboratory. It would act as a conduit to the rest of the world through its national and international dimensions and contacts, importing and exporting new knowledge and ideas from and to it. By involving the people it would disseminate valuable knowledge, understanding and insights to the whole community. (Longworth, Making Lifelong Learning Work)					

3.2 Working with the Local Community

Universities are important organisations in a local community. Here we explore together what formal involvement the university has with the Local Authority in which it resides.

		Yes	No	In plan	Not Rel
3.2.1	Does your Strategic Plan outline a commitment to work with the Local Community				
3.2.2	Does your Strategic Plan outline a commitment to work with the Local Authority				
3.2.2.1	If yes to either, do you have a Senior officer charged with this responsibility				
3.2.2.2	If yes, does that person report to Senior Management?				
3.2.3	Which Civic Bodies is your University represented on				
3.2.3.1	The City Council				
3.2.3.2	The Education Committee				
3.2.3.3	The Chamber of Commerce				
3.2.3.4	Other (please state in the boxes below)				
3.2.4	Are the Civic Authorities represented on the University Senate				
3.2.5	Are they represented on any other Boards or Committees of your University				
3.2.5.1	If yes, please give examples in the boxes below				
3.2.6	Does the university have formal relationships in matters of lifelong learning with any of the following departments of the town council – eg research, project, seminar, conference, course				
3.2.6.1	Education Department				
3.2.6.2	Finance Department				
3.2.6.3	Environment				
3.2.6.4	Health				
3.2.6.5	Police				
3.2.6.6	Transport				
3.2.6.7	Mayor				
3.2.6.8	Social Services				
3.2.6.9	Other (Please state)				
3.2.6.10					
3.2.6.11					
3.2.6.12					
3.2.6.13					
3.2.6.14					

3.2.7 If you have any comments that we need to discuss about the relationships between university and city/region please put them in the box below. If not relevant please explain why.

3.3 The University and Lifelong Learning in the Community

Here we explore together the way in which the university is contributing to the development of a ‘Learning City’ or ‘Learning Region’ in the Authority where it resides.

		Yes	No	In plan	Not Rel
3.3.1	Is there a lifelong learning partnership in the city or region?				
3.3.1.1	If yes, is the University represented upon it?				
3.3.2	Has the city launched itself as a ‘Learning City’				
3.3.2.1	If yes has the University played a role in this?				
3.3.2.2	If no – Has your University ever considered the creation of the Learning City in collaboration with the Civic Authorities?				
3.3.3	Has the university ever been involved in any of the following types of cooperation with the local authority				
3.3.3.1	Assisting its development of a lifelong learning strategy				
3.3.3.2	Offering its premises and facilities for local authority organisations				
3.3.3.3	Taking leadership in the development of a lifelong learning city strategy				
3.3.3.4	Participating in the development of a Learning City strategy				
3.3.3.5	Encouraging staff to participate in City lifelong learning projects				
3.3.3.6	Developing and delivering courses in Lifelong Learning for City staff				
3.3.3.7	Creating a Lifelong Learning Centre at the University for use by all				
3.3.3.8	Getting involved with joint lifelong learning projects with the city				
3.3.3.9	Carrying out lifelong learning research studies for the city				
3.3.3.10	Representing the city at conferences and seminars				
3.3.3.11	Running a conference or seminar on lifelong learning on behalf of the city				
3.3.3.12	Offering accredited lifelong learning courses for city employees				
3.3.3.13	Delivering courses in community centres				
3.3.3.14	Involvement in City Regeneration Projects				
3.3.3.15	Other (please list any other collaboration in lifelong learning and/or learning city projects)				

3.3.4 If you have comments that we need to discuss about the collaboration between university and city/region in matters of lifelong learning and/or learning city, please add to the box below.

3.4 Partnerships between the University, the City/Region and Stakeholders

Effectively operated lifelong learning partnerships with other organisations can create a win win situation for all partners. They can help to attract new students to your University, enhance awareness of the importance of lifelong learning and increase the physical and human resources available to each partner by sharing equipment, and the skills and knowledge of people and organisations. These questions therefore explore with you the establishment of such partnerships and the way in which they operate for the common good.

Please read the following quotation and assess how relevant it is to your university.

- 1= crucial to the future development of the university
- 2= very relevant – implementable strategy now in place to address the issue
- 3= relevant enough to warrant the development of a strategy in the future
- 4= interesting but not relevant enough to warrant strategy development
- 5= Not very relevant

		1	2	3	4	5
3.4.2	The trends towards decentralisation and cost-effectiveness have prompted some companies to seek nearby external resources to meet their training requirements. Universities are responding. After centuries of mutual scepticism and distrust between universities and industry, the joint projects and programmes initiated in the past five years have planted the seeds of a growing mutual respect. Both sides are learning they can form useful partnerships that benefit themselves and the entire European labour market. (Longworth and Davies – Lifelong Learning0					

3.4.3 Relationships with other stakeholders in the locality.

Working together with other stakeholders in the community is more likely to help build a Learning City. Here we explore with you the incidence of partnerships with these other stakeholders in the community.

		Yes	No	In plan	Not rel
3.4.3	Is there a formal policy in your University for encouraging partnerships with the following types of organisation				
3.4.3.1	Local Primary Schools				
3.4.3.2	Local Secondary Schools				
3.4.3.3	Local workplaces in industry employing over 50 people				
3.4.3.4	Local SME's employing under 5 people				
3.4.3.5	Local workplaces in the city Administration				
3.4.3.6	Local Community Centres				
3.4.3.7	Other Local Universities				
3.4.3.8	Local Teacher Training Colleges				
3.4.3.9	Local Special Interest Groups eg ornithologists, environmental campaigners				
3.4.3.10	Local vocational Further Education Colleges				
3.4.3.11	Local non-vocational Further Education Colleges				
3.4.3.12	Local Voluntary Organisations eg churches, scouts and guides etc				
3.4.3.13	Other please state				

3.4.4 Nature of the Partnerships

Here we explore together what these partnerships do to help create a more lifelong learning society. In this question S= schools, A= Adult Education, V= Voluntary Organisations, I= Industry, C= City Administration, IG= Special Interest Group

		S	A	V	I	C	IG
3.4.4	In these partnerships which of the following are a feature						
3.4.4.1	Formally identifying and sharing the resources each can provide for the other						
3.4.4.2	A Co-ordinator to drive the partnership						
3.4.4.3	The physical exchange of people into each others' organisations						
3.4.4.4	The sharing of existing learning resources						
3.4.4.5	Frequent meetings between staff and break down stereotypes						
3.4.4.6	Active encouragement to involve as many people as possible in the partnership						
3.4.4.7	Joint educational meetings at the university or partner premises						
3.4.4.15	Any other characteristics of the running of your partnerships?						

3.4.5 Use of the partnership

Here we are exploring together the use made of partnerships at your university. Again S= schools, A= Adult Education, V= Voluntary Organisations, I= Industry, C= City Administration, IG= Special Interest Group

		S	A	V	I	C	IG
3.4.5	What is the main purpose of the partnerships?						
3.4.5.1	Use of the University's facilities for the partner						
3.4.5.1	Visits to the University by partner staff and/or students						
3.4.5.2	Joint research projects						
3.4.5.3	Secondments						
3.4.5.4	Mentoring relationships between the organisations						
3.4.5.5	Collaborative Courses development and delivery						
3.4.5.6	Joint development of databases						
3.4.5.7	Creating New Resources with the partner						
3.4.5.8	Participation in European and/or national projects						
3.4.5.9	For Streamlining administration						
3.4.5.10	Please insert other activities associated with partnerships in the boxes below						

3.4.6 If you have other comments for discussion about how partnerships contribute to the life and mission of your university, please put them into the box below.

3.5 Research, Development and Delivery in Lifelong Learning for the city/region and stakeholders?

The Learning City/Region concept offers many opportunities for the university to do what it does best – research and development. It is here that the symbiosis of town and gown works well. In this section, we examine together the research and development that the University carries out not only into its own lifelong learning future, but also on behalf of the city/region and its stakeholders.

3.5.1 Research and Development Activity

Here we explore the research and development activity topics which the university may have carried out in this field.

		Yes	No	In plan	Not relevant
3.5.1	Is the University carrying out research and development activities into any of the following?				
3.5.1.1	How people learn?				
3.5.1.2	Resources for Lifelong Learning development				
3.5.1.3	Measuring and Monitoring of city lifelong learning performance and progress				
3.5.1.4	New methods of financing the Learning City				
3.5.1.5	Developing and testing Learning tools and techniques				
3.5.1.6	Learning City and Regional strategy design and development				
3.5.1.7	Mentoring programmes - in all parts of the community				
2.5.1.8	Family Learning				
3.5.1.9	Use of NICT tools to stimulate learning, interaction, contribution and planning in and between communities				

3.5.1.10	the use of the internet to increase communication between citizens of all ages in different cities.				
3.5.1.11	Developing audit Tools and carrying out audits of learning needs in industry, local government and the community at large				
3.5.1.12	partnerships as generators of new resources				
3.5.1.13	Developing and disseminating examples of good practice				
3.5.1.14	encouraging home-school interaction				
3.5.1.15	Active Citizenship and Volunteering				
3.5.1.16	The 'Wired City' Concept				
3.5.1.17	Quality and Lifelong Learning				
3.5.1.18	Developing non-threatening Lifelong Learning examination systems				
3.5.1.19	Skills and Competencies in a Learning Society				
3.5.1.20	Promoting Lifelong Learning effectively				
3.5.1.21	Learning Passports				
3.5.1.22	Please add other research and development focuses not mentioned above				

3.5.2 Courses and Literature

Here we are exploring the courses and the literature (papers, reports, booklets, brochures, studies etc) the university may have developed for people in the city/region

		Yes	No	In Plan	Not rel
3.5.2	Has the University developed and delivered courses on lifelong learning for any of the following				
3.5.2.1	City/Region Councillors				
3.5.2.2	School-teachers				
3.5.2.3	Its own staff				
3.5.2.4	Adult and Further Education lecturers				
3.5.2.5	Cit/region Managers and staff				
3.5.2.6	Business people				
3.5.2.7	The general public				
3.5.2.8	Community Centre staff				
3.5.2.9	People from Voluntary Organisations and/or Special Interest Groups				
3.5.2.10	Others? – please name them below				
3.5.3	Has the University developed brochures, booklets. papers, studies, reports for any of the following				
3.5.3.1	The City/Region Advisory Councils				
3.5.3.2	Schools				
3.5.3.3	Adult and Further Education Colleges				
3.5.3.4	Its own faculties				
3.5.3.5	Business and Industry				
3.5.3.6	The Community at large				
3.5.3.7	The City/Region Development Board				
3.5.3.8	Other organisations/publics? Please say which below				

3.5.4 If you have any comment to add about research, courses and literature, which we need to discuss with you, please put it in the box below

Part 4 Your University and Wider Participation in Higher Education

Part 4 of the audit explores with you your commitment to wider participation. National and international reports focus in upon this as an important step in a lifelong learning society.

4.1 Please give the opinion of senior management in your university to the following quotations.

- 1= crucial to the future development of the university
 2= very important – implementable strategy now in place to address the issue
 3= important enough to warrant the development of a strategy in the future
 4= interesting but not important enough to warrant strategy development
 5= Not relevant to this university

		1	2	3	4	5
4.1.1	Universities and other educational organisations are not generally accustomed to the idea of learners as customers. But when the focus is on the needs and demands of the learner in order to promote a more personal commitment, this is what they become. They are accountable to the learner as customer. In order to facilitate better learning, learning providers must take into account the learning styles and preferences of each individual and tailor courses to them. It must also use a wider variety of learning approaches and be much more acutely aware of how learning takes place in each individual. This is a radical shift both in mission and expertise for all learning providers (Longworth – Making Lifelong Learning Work)					
4.1.3	‘The universality of higher education implies the use of varied forms of intervention in order to meet the educational needs of all at all stages of life.. The facilities they can provide include modifying its approach to individual needs - part-time courses, linked work and training, distance learning, modular courses, virtual delivery methods and the decentralization of training groups. If Universities exist to serve individuals, they have to be prepared to take risks, try out new systems and processes, and make full use of the potential of new technology and distance learning.’ (UNESCO Higher Education Panel)					

4.2 The non-traditional Student

One measure of commitment to this ideal is its policy towards the non-traditional student. A definition of “non-traditional” might be “any student who comes to the university outside of the traditional ways of selection by examination pass for under-graduate study’. Lifelong Learning will create a huge demand for learning from all parts of nations and communities. Here we examine together the university’s degree of flexibility in the selection of the students who attend it.

		Yes	No	In Plan	Not Rel
4.2.1	Does your University have a flexible entry policy for students who:				
4.2.1.1	Come from industry without minimum entry requirements to take continuing education courses				
4.2.1.2	Have not achieved minimum entry passes but who demonstrate personal qualities that will enable them to complete the course				
4.2.1.3	Have not achieved minimum entry passes because of social factors				
4.2.1.4	Have severe physical handicaps				
4.2.1.5	Come from other countries				
4.2.1.6	Are past retirement age				
4.2.1.7	Are mature and studying for a new career				
4.2.1.8	Married Women returners				
4.2.1.9	Are high-flying students younger than 18				
4.2.1.10	Are high-flying students younger than 16				
4.2.1.11	Are Indigenous people with language difficulties (e.g. dyslexia)				
4.2.1.12	Are Foreigners with language difficulties				
4.2.1.13	Are Night shift workers				
4.2.1.14	Are People sick or in hospital during a course				
4.2.1.16	Are Reluctant learners				
4.2.1.17	Can only attend university part-time				
4.2.1.18	Any Other? (please state in the boxes below)				
4.2.1.19					
4.2.1.20					
4.2.2	Are there faculties or disciplines to which your policy is not applied				
	if yes please list in the boxes below				
	.				

4.3 Support for non-traditional students

Sometimes non-traditional students have special support needs. Here we explore with you what these might be at your university.

4.3.1	Does your University offer special support for non-traditional students				
	If yes, please indicate which of the following is offered				
4.3.1.1	An introductory Foundation Course				
4.3.1.2	A formal mentoring support system during their studies				
4.3.1.3	Trained Learning Counsellors (not their own teachers) before they start their studies				
4.3.1.4	Trained Learning Counsellors in case of learning/personal difficulties				
4.3.1.5	An assessment of their most appropriate (mix of) learning styles				
4.3.1.6	Advice on the need for continuing learning				
4.3.1.8	Psychological support if needed				
4.3.1.10	Please list any other supports				

4.3.2 If you have other comments we need to discuss about the university's attitude and policy towards non-traditional students, please put them in the box below.

4.4 Credit Systems and Assessment

Another way to widen participation is to insert some flexibility into the assessment and examination system. Here we explore together how your university is addressing this issue.

		Yes	No	In Plan	Not rel
4.4.1	Does the university offer a system whereby students build up credits towards a degree?				
	If yes does this apply to				
4.4.1.1	Full time students				
4.4.1.2	Part-time students				
4.4.1.3	Masters Degree students				
4.4.1.4	Doctorate Students				
4.4.1.5	Other (please say)				
4.4.1.6	Does this apply within all Faculties				
4.4.1.6.1	If no please name the faculties in which it does not occur				
4.4.2	Does the University participate in the European Credit Transfer System (ECTS)				
4.4.3	Does the university make it possible for students to be examined when ready rather than at a pre-set time				
4.4.4	Does the university cooperate with other universities or other education providers to provide course modules for students where the expertise is not on site?				
4.4.5	Does the university cooperate on joint courses with Further Education providers in the				

	locality				

4.4.7 If you have other comments we need to discuss about flexibility in assessment and examination, please put them in the box below.

4.5 Accreditation of Prior Learning & Prior Experiential Learning

It is absolutely essential to develop high quality systems for the Accreditation of Prior and Experiential Learning (APEL), and to promote their application in a wide variety of contexts. Employers and admissions tutors in education and training institutions, including universities, also need to be persuaded of the worth of this kind of certification. APEL systems evaluate and recognise individuals' existing knowledge, skills and experience gained over long periods and in diverse contexts, including in non-formal and informal settings. The methods used can uncover skills and competencies that individuals themselves may not have realised they possess and can offer to employers. The very process requires the active participation of the candidate, which in itself raises individuals' confidence and self-image' (European Memorandum on Lifelong Learning)

APEL is an important tool for wider participation. Here we explore together your University's commitment to Accreditation for Prior Learning/ Accreditation for Prior Experiential Learning.

		Yes	No	In plan	Not rel
4.5.1	Does your University have an APEL policy				
4.5.1.1	If yes, is the policy freely available to the general public				
4.5.1.2	Does it apply to all faculties or just a specific range				
4.5.1.3	If no which Faculties do not apply such a policy				
4.5.2	Is there a specific person charged with the implementation of the policy				
4.5.5	Are students afforded help or advice in relation to their application prior to admission				

4.5.6 If you have any comments we need to discuss further about APEL please insert them in the box below.

4.6 Flexibility and Access (Wherever, Whenever, However, Whatever, from Whoever)

Finally, participation in Higher Education can be widened by making courses more accessible to potential students. A lifelong learning university is a flexible university. Sunderland University, for example, delivers courses in more than 40 locations within its catchment area. Many of the American Distance Learning Universities offer courses to start at any time with a choice of tutors and examined when the student is ready. We, therefore, explore together the way in which your university is making efforts to take the right education to where the students are and providing it when, how and from whom they require it.

		Yes	No	In plan	Not rel
4.6.1	Wherever - Does your University run courses in any of the following places				
4.6.1.1	Shopping Centres				
4.6.1.2	Public houses, bars etc				
4.6.1.3	Neighbourhood Community Centres, Church Halls etc				
4.6.1.4	Sports Stadia				

4.6.1.5	Theatres				
4.6.1.6	Industrial sites				
4.6.1.7	Prisons				
4.6.1.8	Hospitals				
4.6.1.9	Homes				
4.6.1.10	Other off-campus sites (please state).				
4.6.2	Whenever – Do courses and lessons at your university:				
4.6.2.1	start at different dates during the year eg for new people moving into the area, returning from abroad etc and people who have been ill?				
4.6.2.2	start at different times during the day eg for shift workers, hospital staff etc?				
4.6.2.3	Is there any flexibility in courses to allow people who have missed lessons because of illness, home crises etc. to catch up?				
4.6.2.4	Does your University examine courses as soon as the student is ready?				
4.6.3	However - Does your University:				
4.6.3.1	individualise courses according to the learning styles of its students?				
4.6.3.2	Has the university done any work on individual learning styles				
4.6.4	Whatever - Has your University ever carried out a learning requirements survey to find out what people in its catchment area want to learn in any of the following places				
4.6.4.1	local workplaces				
4.6.4.2	the community as a whole				
4.6.5	From whoever - Does your University offer a choice of teachers/lecturers/tutors to the student				

4.6.6 If there is any comment we need to discuss about flexibility and access please put it in the box below.

Part 5 Information and Communication – internal/external

The way in which the image of learning is presented internally and externally as an attractive and pleasurable activity can make the difference to the success of both the University and the student. Modern, innovative strategies for attracting students, keeping them informed, involving them in their studies and providing facilities for two-way communication need to be utilised. Similarly, a lifelong learning world demands that the needs and demands of every student and member of staff are addressed, including the ability to give and receive learning wherever, whenever, however and from whoever it is required. In these questions therefore, we explore together the way in which the University not only keeps its staff and students informed, but also actively provides for their information needs.

5.1.Promotional activities

		Yes	No	In plan	No rel
5.1.1	Does your University include information about Lifelong Learning in any of the following promotional and publicity methods				
5.1.1.1	Television Advertising about the learning approaches used				
5.1.1.2	A Video including details of lifelong learning in your University				
5.1.1.3	Radio Advertising about the lifelong learning opportunities				
5.1.1.4	Internet pages specifying your University as a Lifelong Learning organisation				
5.1.1.5	Local Press Advertising including lifelong learning in your University				
5.1.1.6	Posters including lifelong learning in visible places				
5.1.1.7	Leaflets developed to show your University as an attractive place to learn				
5.1.1.8	Workshops and/or seminars for potential students				
5.1.1.10	The University Brochure				
5.1.1.11	The National telephone information services eg Learn Direct				
5.1.1.12	Other please specify				
5.1.3	Is there a brochure about the lifelong learning approach used at the university				
	If yes – is it made freely available to:				
5.1.3.1	Local Schools				
5.1.3.3	Local Adult Education Colleges				
5.1.3.4	Local Community Centre				
5.1.3.5	Local shopping centres				
5.1.3.8	Local Companies				
5.1.3.9	Are there several versions of the literature aimed at specific audiences				
5.1.3.10	Please name any other method you have of delivering the learning message to potential students				

5.1.4 If there is any comment we need to discuss about publicity and marketing of lifelong learning at your University, please put it in the box below.

Part 6 Student and Staff Support and Development for Lifelong Learning

Part 6 of the audit explores with you the issues associated with Support of both Students and Staff at your University.

6.1 Please say how relevant Senior Management considers the following quotation to be to the future development of the university.

- 1= crucial to the future development of the university
- 2= very relevant – implementable strategy now in place to address the issue
- 3= relevant enough to warrant the development of a strategy in the future
- 4= interesting but not relevant enough to warrant strategy development
- 5= Not very relevant

		1	2	3	4	5
	As we move into the Knowledge Age, our understandings of what learning is, where and how it takes place, and for what kinds of purposes, are changing. We increasingly expect teaching and learning methods and contexts to recognise and adapt to a highly diverse range of interests, needs and demands, not only of individuals but also of specific interest groups in multicultural European societies. This implies a major shift towards user-oriented learning systems with permeable boundaries across sectors and levels in all types of learning establishment (Ball – Action Agenda for Lifelong Learning.)					

6.2 Student Development

In this section we explore together several issues concerning student support in a modern lifelong learning university. In the answers 1= 0%, 2= 1-10%, 3= 11-50%, 4= 51-94%, 5= 95-100%

		1	2	3	4	5
6.2.1	What proportion of students have access to:					
6.2.1.1	A formal mentoring support system from within the university in addition to the teacher/lecturer					
6.2.1.2	A trained Learning Counsellor who can advise on academic matters before they start their studies					
6.2.1.3	A trained Learning Counsellor in case of learning difficulties during their studies					
6.2.1.4	A trained Counsellor in case of personal difficulties during their studies					
6.2.1.5	A grievance system with guaranteed anonymity and reply					
6.2.1.6	An assessment of their most appropriate (mix of) learning styles					
6.2.1.7	Advice on personal development skills					
6.2.1.8	Financial advice					
6.2.1.10	Careers Advice for several years ahead					
6.2.2	What proportion of students have completed A personal learning action plan (a tool for planning their learning and the support they will need in all aspects of their life)					

6.3 Development of Student Skills, Attributes and Values for a Lifelong Learning Future

'The methods used to promote a healthy sense of self-esteem, learning motivation and learning skills in education are critical for the development of lifelong learning values and attitudes. Educational Institutions should encourage their students to learn beyond their organisation and analyse how that contributes to the whole spectrum of an individual's intellectual growth'. (Finnish National Lifelong Learning Strategy)

		1	2	3	4	5
6.3.1	To what extent does the university require personal development skills, values and attributes to be a formal component in courses offered at your university:					

6.3.2 If you have comments about student support for lifelong learning which you feel we need to discuss please put them in the box below

6.4 Staff Development

Not only students but also teachers and lecturers of the 21st century will need to have a much wider range of skills and understanding of learning processes. These questions therefore relate to the way in which your University is anticipating the move from a teaching to a learning paradigm in which the focus is on the needs of each learner.

6.4.1 To what extent does Senior Management in the University consider the following quotations relevant to staff development in the future?

- 1= crucial to the future development of the university
- 2= very relevant – implementable strategy now in place to address the issue
- 3= relevant enough to warrant the development of a strategy in the future
- 4= interesting but not relevant enough to warrant strategy development
- 5= Not very relevant

		1	2	3	4	5
6.4.1.2	Education providers at all levels have to start focusing on the needs of people as learners - finding out why, when, what and how people prefer to learn, discovering new learning methods, identifying the basic skills which people need in order to learn better - learning to learn, developing our potential, handling information, developing thinking skills - individually, in groups and in families - using the modern education delivery technologies and tools to provide new learning for renewed people wherever they want to receive it. (Longworth – Making Lifelong Learning Work)					
6.4.1.3	In a world in which information is doubling every five years, no-one expects educators to have total knowledge. Their most valuable function is as a trained, skilled manager - a conductor of the orchestra of learning, introducing the instruments which facilitate the learning in a wide range of symphonic variations					

6.4.2 Educator Skills for the 21st Century.

Here we explore together to what extent the lecturers at your university are (being) prepared for a lifelong learning approach to their teaching.

In the answers 1= 0%, 2= 1-10%, 3= 11-50%, 4= 51-94%, 5= 95-100%

		1	2	3	4	5
6.4.2	The following is a list of those skills which educators will have to develop in order to improve the learning of students. What percentage of your lecturers do you estimate already have them					
6.4.2.1	How to set and use personal learning plans for their students					
6.4.2.2	The effective use of mentoring					
6.4.2.3	Knowledge of how to identify and use individual learning styles					
6.4.2.4	Knowledge of how to establish and use partnerships with other organisations (eg industry) as a new resource for learning					
6.4.2.5	Practical knowledge of the uses of computers as aids to learning					
6.4.2.6	Familiarity with the latest research on how people learn					
6.4.2.7	Practical experience and knowledge of distance learning techniques					
6.4.2.8	Up to date knowledge of the psychology of how people learn					
6.4.2.9	Knowledge of how to use electronic networks to help learning and learner motivation					
6.4.2.10	Skills as a resource manager to mobilise and use all the resources in the community to improve the learning of their students					
6.4.2.11	Knowledge of how to carry out and analyse learning audits					
6.4.2.12	Knowledge of new evaluation and assessment techniques					
6.4.2.13	Ability to teach in several types of learning organisation					
6.4.2.14	Would you like to list more of these below?					

6.4.3 Educator Training at your university

Here we explore together how these new skills are being developed.

		yes	No	In plan	Not rel
6.4.3	Is there a plan at your university to identify and implement these lifelong learning skills for educators				

In the answer below 1= 0%, 2= 1-10%, 3= 11-50%, 4= 51-94%, 5= 95-100%

		1	2	3	4	5
6.4.4	What percentage of staff (lecturers and administrators)					
6.4.4.1	Have completed a learning requirements audit					
6.4.4.2	Have developed a personal learning action plan					
6.4.4.3	Use guides and mentors					
6.4.4.4	Have completed a course on lifelong learning					
6.4.4.5	Include lifelong learning concepts in their courses					

In the answer below 1= 0, 2= 1-3, 3= 4-6, 4= 7-10, 5= more than 10

		1	2	3	4	5
6.4.5	How many days in the year will the average lecturer go on a course to update subject knowledge					
6.4.6	How many days in the year will the average lecturer go on a course to update teaching skills					

6.4.7 If you have comments to make about staff development that should be discussed, please write them in the box below.

Part 7: Using Distance Learning, Multimedia Technology and Electronic Networks for Learning

The effective use of technology is essential to the modern University and helps to meet the new lifelong learning demands of flexibility and increased capacity. These questions explore together 3 aspects of the use of learning technologies in your University

1. The development and effective use of distance learning technologies (satellite, cable, ISDN, radio etc) to develop and deliver learning

2. The use of electronic networks and the internet to increase learning incidence and performance

3. The development and use of open learning systems and multimedia software

7.1 Distance Learning

1= 0-5%, 2= 6-15%, 3= 16-30%, 4= 31- 50%, 5= over 50%

		1	2	3	4	5
7.1.1	What proportion of classrooms and laboratories have broadband capability for reception of courses at distance					

		yes	no	In plan	Not rel
7.1.2	Does your university have broadband capability for delivery of courses at distance				
7.1.2.1	To learners in classrooms etc within your university				
7.1.2.2	To learners in locations outside your university				
7.1.2.3	If yes what is the main delivery technology				
7.1.2.3.1	Cable				
7.1.2.3.2	Satellite upload				
7.1.2.3.3	ISDN				
	Other (please say)				
7.1.3	Is there at your university a strategy to increase broadband facilities for learning?				
7.1.4	Is there a distance learning studio?				
7.1.5	Is there a videoconferencing facility?				
7.1.6	Is there a course development facility for distance delivery in your university?				
7.1.7	Is there a defined strategy to improve the knowledge of educators at the university about the effective uses of distance learning systems?				
7.1.8	Does your university have an outreach mission to deliver education to the community?				

7.1.8 If you wish to add further comments for discussion about distance learning at your university, please insert them in the box below

7.2 E-learning, the Internet and international networks:

Here we explore together issues relating to the use of communications technology as a teaching and learning medium at your university.

In the answers below 1= 0-10%, 2= 11-30%, 3= 31-50%, 4= 51-75%, 5= over 75%

		1	2	3	4	5
7.2.1	To what extent are the following aspects of communications technology used in your university's learning strategies					
7.2.1.1	Email facilities for staff					
7.2.1.2	Email facilities for students					
7.2.1.3	Using the internet as a reference source					
7.2.1.4	Using the internet as a learning source					
7.2.1.5	The development of e-learning courses					
7.2.1.6	The delivery of e-learning courses					
7.2.1.7	Formal linking with students/staff in other countries					
7.2.1.8	Collaborative Learning with students in other countries					
7.2.1.9	Collaborative administration with other organisations					
7.2.1.10	The joint development of databases with students from other parts of the world					
7.2.1.11	The development and delivery of courses for the local authority					
7.2.1.12	The development and delivery of courses for industry					
7.2.1.13	Do you wish to add more in the boxes below?					
7.2.2	What proportion of staff are able to use e-learning strategies?					

		Yes	No	In plan	Not relevant
7.2.3	Is there a formal plan to increase this type of activity within your university				
7.2.4	Is there a formal course for staff on the effective educational use of e learning and the internet				
7.2.5	Does your university participate in any European or National projects involving electronic networking as a learning medium/environment				

7.2.6 If you wish to add any comment for discussion about the use of e-learning and the internet at your university, please do so in the box below

Part 8 Other Lifelong Learning Aspects

Lifelong Learning imposes a radical change of outlook in Universities in order to cope with a vastly increased demand for education from a much wider section of the population. It requires a much closer focus on the real needs and demands of the learner, a wider engagement with the world outside of your University and an acute awareness of learning as a pleasurable activity which should be celebrated. In these last questions we pick up some of the loose ends not addressed in other sections.

8.2 Resources for lifelong learning

Here we examine with you the pressing issues connected with the financing of lifelong learning and where the resources might be found.

		Yes	No	In plan	Not rel
8.2.1	Is there a formal plan to examine how new resources for lifelong learning can be created in the university and the city				
	If yes does it include any of the following				
8.2.1.1	identifying new human resource - expertise, knowledge and talent in the local community				
8.2.1.2	inserting lifelong learning modules/lessons into the curriculum				
8.2.1.3	marketing lifelong learning to business and industry and developing solutions				
8.2.1.4	requesting new resources for lifelong learning from funding organisations				
8.2.1.5	carrying out commissioned research on behalf of the city/region				
8.2.1.6	participating in European Projects on lifelong learning using EC grants				
8.2.1.7	establishing partnerships to help create new resources				
8.2.1.8	streamlining the administration into a more efficient operation				
8.2.1.9	the greater use of education technology				
8.2.1.10	increasing the number of paying mature students				
8.2.1.11	exchanging staff expertise with and from other organisations				
8.2.1.12	Please insert any other resource initiatives for lifelong learning development				

THANK-YOU FOR COMPLETING THIS STAKEHOLDER AUDIT. WE APPRECIATE YOUR EFFORT AND YOUR FEEDBACK. WE HOPE THAT, TOGETHER, WE HAVE GAINED NEW KNOWLEDGE ABOUT YOUR PERFORMANCE AND PROGRESS AS A LIFELONG LEARNING ORGANISATION, AND, MORE IMPORTANTLY IN THE CONTEXT OF THE R3L PROGRAMME, AN ABUNDANCE OF IDEAS ON HOW YOUR UNIVERSITY CAN HELP TO TRANSFORM YOUR OWN CITY AND REGION INTO A LEARNING CITY AND A LEARNING REGION

**OTHER STAKEHOLDER AUDITS HAVE BEEN DEVELOPED FOR
ADULT VOCATIONAL EDUCATION ORGANISATIONS
SCHOOLS
SMALL BUSINESSES
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You will also benefit greatly from the learning materials to be found at www.longlearn.org.uk/materials.html.

For further reading try 'Learning Cities, learning regions, learning communities' and 'Lifelong Learning in Action' both available from http://www.taylorandfrancis.co.uk/shopping_cart/search/search.asp?search=longworth/

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