

# **The Pallace Project – New Zealand**

# **A Stakeholder Audit**

## **Adult Education and Lifelong Learning**

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

Originally developed by Norman Longworth, Hon Professor of Lifelong Learning, University of Stirling and modified for use in New Zealand by Dr Vicky Adin, Papakura Lifelong Learning Trust

# Introduction to the Adult Education Stakeholder Audit (New Zealand version)

## Introduction

'Learning Cities', 'Learning Regions', 'Learning Organisations' are terms that are increasingly used to describe the rationale for the transformation of cities, towns, regions and organisations for a knowledge age. 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. The implications for Adult Education and Training organisations throughout the world are far-reaching and important. The vast increase in demand for learning throughout life from people of all ages will put great strain on this sector, and the changes demanded in methodology and approach to cope with a wider range of learner will impose challenges to management, staff and students.

## The PALLACE project

This is a European Commission funded project to link learning cities and regions around the world. It has partners from Australia, New Zealand, Canada, Europe and China. Each partner leads a project that links stakeholders in two countries and exchanges information and insights that will be valuable to them in future planning for a knowledge society in which lifelong learning is the driving force. Such a process also offers other advantages in terms of a deeper knowledge and appreciation of other cultures and procedures to those who participate be they students, teachers or members of the public. Each country will adapt the results in accordance with their own culture. Thus in New Zealand, the Papakura Lifelong Learning Trust has worked with Napier University in Edinburgh, Auckland University and other NZ regional institutions to develop this audit which will be applied in both New Zealand and France. It is a modification of the stakeholder audit developed previously in a European project called 'Indicators'.

## A Word about Stakeholder Audits

The audit itself is not simply a questionnaire. It is a carefully-worded instrument to engage adult vocational education organisations in debate with themselves about their own future as quality learning organisations, and their relationship to others in the city/region and beyond. The learning city/region rationale is embedded in each action element of the audit tool, in order to help management and staff, and students, 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' tools we have created for vocational education and training colleges therefore have five purposes, all of which are connected with meeting these criteria in a learning region:

- It will enable them to measure their performance as 'learning organisations' within a learning region.
- It will explore all the parameters which enable a modern Adult Education Facility to address the vast number of changing needs and demands of a 21<sup>st</sup> century lifelong learning society.
- It will examine the role of the institution 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 Adult Education in other regions and countries
- It can be used as a discussion stimulator for students and staff in the institutions themselves

This audit is in the public domain and can be used by any institution that wishes to use it either as it is or in a modified form. The authors accept no responsibility for misuse or misunderstanding. However, we have tried to make the Audit both flexible and useful by dividing it into sections dealing with different aspects of the institution's activities. Please note that this is a tool and not just a questionnaire – its purpose is to stimulate thinking and debate, and to promote action, on the many aspects of regional social and economic development, and particularly the importance of lifelong learning in it. Inevitably, because it fully engages the participant, it is long. The transition to a Learning Organisation affects all parts of the institution, often in quite fundamental ways, and the change process it will engender will take months and years. It is not therefore a tool to be used for a week and then discarded.

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

**Adult Education Stakeholder Audit – New Zealand**

**Some General Questions concerning your Institution**

City .....  
City Population .....  
Name and Address  
of Institution .....  
.....  
.....  
.....  
.....  
Tel: .....  
Fax: .....  
Email .....

No of Students in Institution .....  
No of staff .....  
Age Range of students .....  
Courses Offered  
    Post-graduate education  
    Vocational Education to degree level .....  
    Vocational Education below degree level ....  
    Non-vocational Education Courses .....  
    Other (please say) ....

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Other relevant information  
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## **Part 1 Making a commitment to Lifelong Learning**

Many Adult Education Institutions are fast becoming Learning Organisations, taking up the concepts of lifelong learning and implementing them into their administration, their courses and curricula. These questions can be seen as debating points to enhance the internal discussions about the implementation of lifelong learning principles and the strategies and actions already taken to put them into practice.

### **1.1 Developing a strategy for lifelong learning**

1.1.1 In your opinion, how much truth is there in the following quotations?

1= In every respect 2= A lot 3= average, 4 = not much 5 = none at all

- 1.1.1.1 Nations and communities have pinned their hopes on Adult Education as a means of getting more people into learning and of breaking down the long-standing resistance to a learning culture. It is the advance guard in the fight against complacency and ignorance. But of course the task is not as simple as it sounds. Providing more courses, improving access and reaching out into the community are only the first steps. Much more needs to be done to turn education and training into lifelong learning in the Adult Education institutions themselves (Australian National Training Agency)

1	2	3	4	5

### **1.2 Your institution and lifelong learning**

1.2.1	Does your institution formally call itself a Lifelong Learning Institution?	Yes	No	In plan
1.2.2	Does it have a published lifelong learning strategy?			
1.2.3	If yes, does it make it available to students and staff?			
1.2.4	If yes or in plan which people have been involved in developing it?			
1.2.4.1	The Principal			
1.2.4.2	All Staff Members			
1.2.4.3	Some staff members			
1.2.4.4	All students			
1.2.4.5	Some students			
1.2.4.6	Union representatives			
1.2.4.7	City Council representatives			
1.2.4.8	Business and Industry Representatives			
1.2.4.9	Other (please state)			
1.2.5	Does the strategy link into the city or regional strategy for lifelong learning?			

### **1.3 Implementing the lifelong learning strategy**

		Yes	No	In plan
1.3.1	Have all the teaching staff received individual guidelines on lifelong learning policy			
1.3.2	Have all the administrative staff received individual guidelines on lifelong learning policy			
1.3.2	Have the students been given information about lifelong learning?			
1.3.3	Are there feedback channels to management on this matter?			
1.3.4	Does the institution have a lifelong learning committee			
	If yes who is on it			
1.3.4.1	The Principal			
1.3.4.2	All Staff Members			
1.3.4.3	Some staff members			

1.3.4.4	All students			
1.3.4.5	Some students			
1.3.4.6	Union representatives			
1.3.4.7	City Council representatives			
1.3.4.8	Business and Industry Representatives			
1.3.4.9	Other (please state)			
1.3.5	Is there a person in sole charge of Lifelong Learning development?			
1.3.5.1	If yes does that person have a separate budget?			
1.3.5.2	Do his/her responsibilities include relations with external organisations?			

## **1.4 Lifelong Learning Charters**

1.4.1 How far does the following statement match your institution's perceptions?

1= in every respect, 2= a lot, 3= some 4= only a little, 5 = not at all

1	2	3	4	5

1.4.1.1 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 societies. (European memorandum on lifelong learning)

NB a draft charter of rights is attached as annexe 1 to this document. Please look briefly at this and express your opinion below as it applies to your own institution

		Yes	No	In plan
1.4.2	Does the Institution have a similar Lifelong Learning Charter or statement describing its values and commitment to implementing Lifelong Learning solutions? (see note above)			
1.4.3	Does the Institution have a charter or statement outlining the rights of its learners to learning support?			
1.4.4	Does the institution have a charter or statement outlining the responsibilities of its learners to the institution			
1.4.5	If no to these is the charter of any use to the development of such a commitment?			

## **1.5 The Institution as a Learning Organisation**

1.5.1 How important are the sentiments expressed in the following statements to the institution's present and future development

1= in every respect 2= a lot, 3= average, 4= a little, 5= not at all

		1	2	3	4	5
1.5.1.1	<i>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. (Ball: Action Agenda for Learning)</i>					
1.5.1.1	<i>Despite the presence of trust and togetherness the learning organisation is</i>					

<i>not a comfortable place for traditional leaders. It is an upside down sort of place, with much of the power residing at the organisation's edge. In this culture imposed authority no longer works. Instead, authority must be earned from those over whom it is exercised. The organisation is held together by shared beliefs and values, by people who are committed to each other and to common goals. It is an organisation of consent, not of control. (Charles Handy – Managing the Dream)</i>					
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1.5.2 To what percentage do you believe that the institution conforms to the following 'learning organisation' characteristics

1= 0-5%, 2= 6-20%, 3= 21-40%, 4= 41-70% 5= over 70%

(NB: annexe 2 contains a definition of 10 characteristics of a Learning Organisation)

		1	2	3	4	5
1.5.2.1	pro-actively puts the learner's needs and requirements at the forefront of its strategies and policies	<input type="checkbox"/>				
1.5.2.2	provides the support structures to enable staff and students to develop their full potential	<input type="checkbox"/>				
1.5.2.3	Has special procedures for actively helping all less fortunate people irrespective of creed, culture, language, handicap, race or nationality	<input type="checkbox"/>				
1.5.2.4	Decisions are made and acted upon at the most appropriate point in each department	<input type="checkbox"/>				
1.5.2.5	A sophisticated reward system exists and is applied to all people in the institution	<input type="checkbox"/>				
1.5.2.6	Non-hierarchical – each employee is a colleague and treated with equal respect	<input type="checkbox"/>				
1.5.2.7	Feedback on all matters is welcomed, acted upon and always replied to	<input type="checkbox"/>				
1.5.2.8	There is a sophisticated confidential system of airing grievances with no come-back to the complainant	<input type="checkbox"/>				
1.5.2.9	Everyone is encouraged to contribute to policy-making. Suggestions always replied to	<input type="checkbox"/>				
1.5.2.10	Prominent displays in all departments and buildings of the value of learning and encouragement to take it	<input type="checkbox"/>				
1.5.2.11	Everyone has a personal daily, weekly and monthly Learning target	<input type="checkbox"/>				
1.5.2.12	Everyone member of staff has been on a quality improvement course and is constantly trying to improve performance	<input type="checkbox"/>				
1.5.2.13	Everyone has a hand in defining the mission of the department and is given a copy of the mission statement	<input type="checkbox"/>				
1.5.1.14	Everyone knows, and acts upon, the institution's strategy for the present and the next five years	<input type="checkbox"/>				
1.5.1.15	The Institution operates an externally validated organisational quality standards policy? eg ISO 9000, Investors in People (UK)?	<input type="checkbox"/>				
1.5.2.16	Every effort is made in many different ways to keep all people up to date with events, news, successes, failures, problems, opportunities	<input type="checkbox"/>				
1.5.2.17	Every lesson on every course requires formal feedback from the students on the learning content and the performance of the educator	<input type="checkbox"/>				

## 1.6 Providing incentives/rewards

		Yes	No	In plan
1.6.1	Does the institution put any of the following in place to reward further learning or exceptional achievement among its own staff			
1.6.1.1	Payment of course fees			
1.6.1.2	Financial rewards for successful completion			
1.6.1.3	Automatic promotion to another salary level			
1.6.1.4	Time off to take courses			
1.6.1.5	Extra holiday in lieu of payment			
1.6.1.6	Exceptional achievement certificates			
1.6.1.7	other incentives/reward for excellent work eg dinner for two			
1.6.1.8	Other (please state)			
1.6.1.9				

1.6.2 If you have any further comment about the institution's lifelong learning policies please use the lines below to express your thoughts and/or opinions, or to provide information.

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**Part 2 Is your institution broadcasting the right message of lifelong learning to its stakeholders?**

Adult Education Institutions are, whether they like it or not, at the forefront of social, economic and political change. They will survive as 21<sup>st</sup> century learning organisations only by making their product more desirable and accessible to the vastly increased numbers of potential learners who themselves need to be convinced of the value of learning. These questions can be seen as points of debate about how the institution goes about addressing its target audiences in the new 21<sup>st</sup> century paradigm.

**2.1. Marketing and Promotion of Lifelong Learning to the outside world**

‘Modern, innovative strategies for attracting students, presenting learning as a personally fulfilling and pleasurable activity throughout life, and providing facilities for two-way communication need to be utilised’. (European Memorandum on Lifelong Learning)

2.1.1 Does the institution actively promote and publicise itself as a Lifelong Learning Organisation by any of the following means? (N/A = Not applicable to this institution)

		Yes	No	In plan
2.1.1.1	Television Advertising about the learning approaches used			
2.1.1.2	A Video specifically publicising lifelong learning in the institution			
2.1.1.3	Radio Advertising about the lifelong learning opportunities			
2.1.1.4	Local Press Advertising about lifelong learning in the institution			
2.1.1.5	Posters about lifelong learning in the institution in visible places			
2.1.1.6	Internet pages specifying the institution as a Lifelong Learning organisation			
2.1.1.7	Leaflets developed to show the institution as an attractive place to learn			
2.1.1.8	Other – please specify			

2.1.2 Are there active marketing links with any of the following in order to enthuse potential students about the benefits of learning at the institution?

		Yes	No	In plan
2.1.2.1	Local Schools			
2.1.2.2	Local business and industry			
2.1.2.3	The City Administration			
2.1.2.4	Local Community Organisations			
2.1.2.5	Overseas education establishments			
2.1.2.6	Local professional organisations			
2.1.2.7	Universities			

**2.2 Internal Communication of Lifelong Learning**

2.3.1 Does the institution employ any of the following strategies to develop lifelong learning awareness in students and staff?

		Yes	No	In plan
2.3.1.1				
2.3.1.2	A lifelong learning logo used on every information leaflet			
2.3.1.3	Posters on classroom or laboratory walls outlining the virtues of learning			
2.3.1.4	A leaflet about lifelong learning opportunities for every student			
2.3.1.5	Displays in staff-rooms about lifelong learning in the institution			
2.3.1.6	Information bulletins outlining the lifelong learning policy			
2.3.1.7	Other strategies (please state)			

2.3.2 If you have any further comment about the institution’s lifelong learning information strategy, please use the lines below to express your thoughts, opinions and information.

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### Section 3 Wherever, Whenever, However, Whatever, from Whoever – the flexible Institution

Modern Adult Education Institutions are beginning to provide whatever courses wherever, whenever, however and from whomsoever people want to receive them. These questions can be used to enhance the debate about flexibility and adaptability in the institution.

#### 3.1 Wherever

		Y	N	I.P.
3.1	(Wherever) Does the institution run courses in places where the people are			
3.1.1	If yes, does it deliver courses in any of the following.			
3.1.1.1	Large Companies			
3.1.1.2	Small companies			
3.1.1.3	Churches or Church halls			
3.1.1.4	Community centres			
3.1.1.5	Public houses			
3.1.1.6	Theatres			
3.1.1.7	Leisure centres			
3.1.1.8	Open air – eg parks			
3.1.1.9	Shopping Centres			
3.1.1.10	Homes			
3.1.1.11	Sports Clubs			
3.1.1.12	Other (please state)			

#### 3.1.2 Courses run outside the institution's buildings

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

What proportion of courses are run outside the institution's buildings

1	2	3	4	5

#### 3.2 Whenever

		Y	N	IP
3.2.1	(Whenever) Where possible does the institution operate flexible starting <u>dates</u> so that courses are delivered when the customer wants to receive them.			
3.2.2	(whenever) Where possible does the institution operate flexible starting <u>times</u> for the same reason?			
3.2.3	(Whenever) Does the institution examine courses as soon as the student is ready?			

#### 3.3 Whatever

3.3.1	institution ever carried out a learning requirements discover what people in its catchment area want to learn?			
3.3.2	If yes has it been carried out in			
3.3.2.1	Schools			
3.3.2.2	Companies			
3.3.2.3	The community			
3.3.2.4	Other (please state)			
3.3.2.5				
3.3.3	If no – how does it know what courses to offer?			
3.3.3.1	Intuition			

3.3.3.2	The examination boards			
3.3.3.3	Experience			
3.3.3.4	It doesn't really know			
3.3.3.5	Other (please state)			
3.3.3.6				

**3.4 However**

*'Educational organizations 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'* (Longworth – Lifelong Learning at Work)

		Yes	No	In plan
3.4.2	In general is there a trend to regard, and treat, the learner as a customer in the institution?			
3.4.2	Does the institution individualise courses according to the learning styles of its students			
3.4.3	Has the institution ever attempted to analyse the preferred learning styles of its students			
3.4.4	Does the institution offer a choice of teacher/lecturers to the student			

**3.5 Access – Assessment of Prior Experiential Learning (APEL)**

*'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 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)

- 3.5.3 Does the institution operate a formal APEL (Assessment of Prior Experiential Learning) system
- 3.5.4 Is life experience (eg management skills acquired in bringing up children) a factor in allowing new students to start courses at a higher level

Yes	No	In plan

3.5.5 If you have any further comment or information about APEL and any aspect of the institution's lifelong learning access strategy, please use the lines below to express your thoughts and/or opinions.

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## 5. The Institution in the wider world

Modern Adult Education Institutions don't exist in a vacuum. They are a vital and vigorous part of a local and regional dynamic of learning provision across the board. They may, or may not, be a part of a formally expressed 'Learning City' but they have the potential to influence the many ways in which learning takes place there. These questions can be used as discussion points to explore the institution's relationship to the outside world and the ways it can influence, and be influenced by, it. NB Annexe 3 contains a definition and a description of a learning city

### 5.1 The institution's role and activities in helping its city become a learning city

Two European Commission definitions of a Learning city, town or region.

***'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'***

***'A Learning Community is a city, town or region which goes beyond its statutory duty to provide education and training for those who require it and, instead, creates a vibrant, participative, culturally aware and economically buoyant human environment through the provision, justification and active promotion of learning opportunities to enhance the potential of all its citizens '***

0-5%	6-15%	16-30%	31-50%	Over 50%

5.1.1 To what extent do you believe that the town or city in which the Institute is situated meets either of the definitions above

Yes No In plan

5.1.2 Has the town, city or region in which the Institute is situated formally declared itself to be a 'learning town, city or region'

5.1.3 In which of the following does the institution participate with the municipality or region?

5.1.3.1 Is represented on the local lifelong learning committee

5.1.3.2 Encourages the city to become a learning city

5.1.3.3 Has a specific contact point with city lifelong learning officers

5.1.3.4 Performs studies and surveys (eg skills surveys) on the city's behalf

5.1.3.5 Participates in joint projects with the city and other partners

5.1.3.6 Helps develop personal learning plans for city staff

5.1.3.7 Runs learning fairs and learning festivals on behalf of the city

5.1.3.8 Runs courses on lifelong learning topics for city administrators and/or staff

5.1.3.9 Encourages its staff to participate in learning city development

5.1.3.10 Encourages its students to participate in learning city development

5.1.3.11 Helps the city mobilise its citizens for active citizenship

5.1.3.12 Runs conferences and/or seminars on behalf of the city

5.1.3.13 Participates in the environmental education of citizens

5.1.3.14 Other (please state)

5.1.3.15

5.1.4 If you wish to add a comment here about the institution's relationship to the development of a learning city, please use the lines below to express your thoughts and/or opinions or more information.

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## 5.2 Partnerships for mutual benefit.

*'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 the institution, 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.'* (NewTELS Adult Education Survey)

5.2.1 How strong are the institution's links with other institutions and organisations

1= formal partnerships with joint projects 2= formal partnerships, fairly frequent contact, 3= informal partnerships with occasional contact, 4= little contact 5= no links

		1	2	3	4	5
5.2.1.2	Local schools					
5.2.1.3	Local Higher Education establishment(s)					
5.2.1.4	Small companies					
5.2.1.5	Other Adult Education Colleges					
5.2.1.6	Professional Associations					
5.2.1.7	Chambers of Commerce					
5.2.1.8	The Media					
5.2.1.9	Community and Voluntary Organisations					
5.2.1.10	Local Government					
5.2.1.11	National Government					
5.2.1.12	International Adult Vocational Education organisations					
5.2.1.13	Other (please state)					
5.2.1.14						

## 5.3 External Institution lifelong learning activities

But values go further than people. There are organisational values - a company develops a set of values about the worth of its people and invests in their development. Accordingly; a school, college or university develops a set of values which must in the future go beyond the statutory responsibility to provide a basic knowledge of the standard curriculum. Each is an investment in a lifelong learning future for both the organisation and individuals. In many respects it is also an exercise in survival in a competitive world. (Learning Communities Learning)

		Yes	No	In plan
5.3.1	Does the institution do any of the following lifelong learning activities			
5.3.1.1	Belongs to a local organisation promoting lifelong learning values			
5.3.1.2	Belongs to a national organisation promoting lifelong learning values			
5.3.1.3	Belongs to an international organisation promoting lifelong learning values			
5.3.1.4	Participates in national lifelong learning projects			
5.3.1.5	Participates in international lifelong learning projects			
5.3.1.6	Runs courses for other citizens on lifelong learning topics			
5.3.1.7	Taps into the talents, skills, knowledge and expertise available in the local community to enhance its courses			
5.3.1.8	Uses this talent to establish mentoring relationships for students			
5.3.1.9	Is involved with family learning with its students			
5.3.1.10	Gets involved with national lifelong learning campaigns (eg learning at work days etc)			
5.3.1.11	Shares resources with other local organisations			
5.3.1.12	Runs open days for the local community			
5.3.1.13	Runs learning fairs and learning festivals for the city			
5.3.1.14	Sponsors local events for charity			
5.3.1.15	Regards itself as a good active corporate citizen in the community in which it operates			
5.3.1.16	Has a published environmental policy			
5.3.1.17	Has an active students' council			
5.3.1.18	Other (please state)			
5.3.1.19				

