

Trade Union and University Lifelong Learning in Partnership TULIP

Interim External Evaluation Report

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FOREWORD

This external evaluation report is written in the mid-term of a Socrates-Leonardo project called TULIP “Trade Union and University Lifelong Learning in Partnership” (2007 - 1984 /001 -002).

The key focus of the evaluation is the role of partners in an international network project.

The evaluation was implemented in fruitful cooperation with the Coordinator and Contractor. An interactive and target-oriented approach has shown to be an effective tool to support the production of outcomes in European projects.

This report reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

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Kari Seppälä

1 EVALUATION SUPPORTING THE TULIP PROJECT

1.1. The TULIP project in brief

The project will facilitate the exchange and transfer of models of cooperation between Trade Unions (TUs) and Universities in the delivery of work based lifelong learning (WLLL) to Trade Union members/employees.

The TULIP Project is producing a web-based resource kit, publicly available to all interested parties, to include national reports case studies, papers, collated papers from the final conference, details of 'experts' and bibliography & links to relevant websites. These resources will be found at www.tulipnetwork.org.uk.

In addition to the major web resource, the network activities include network meetings, open conference in 2009, dissemination and exploitation.

TULIP has 14 partners from 9 countries, including those where the TU movement is comparatively newly developed. The partners include Trade Unions working at both regional and national level, universities and a European-wide university LLL network.

1.2. Evaluation in its entirety

The TULIP evaluation covers (1) the monitoring and internal evaluation functions of the project as well as the (2) external evaluation. The Coordinator and the Contractor have taken good care of following the activities and production of outcomes in the project. As the external evaluator I have concentrated on the partner roles in the project and the specified and agreed foci of evaluation.

1.3. External evaluation

The main idea is to use the evaluation to remind the TULIP partners of certain key issues that are relevant, when we want the project to be a success both for each individual and his/her institution as well as the project and its financiers. This will take place by a two-phase-enquiry, where the partners will answer more or less the same questions in the beginning and at the end of the project. Only few questions about the project experience of the partners will be added.

The set of questions aims to assure that the partners act in an appropriate way in relation to the general aims of the project as well as the partners' professional development. The approach is parallel to giving the students the questions for an examination in advance so as to focus their attention on the key elements of the required reading.

The Webropol tool supports the answering, analysis and reporting on the internet.

Implementing the external evaluation

1. The evaluator drafted *the evaluation plan* for the project. The plan was finalised for the management group with the Coordinator and Contractor in professional and friendly cooperation.
2. The evaluator drafted the *first set of questions* for the enquiry. The questions were structured and modified with the Coordinator and Contractor so as to sharpen the focus and make the answering practical, convenient and useful.
3. The evaluator presented the approach to evaluation and the practical arrangements in *the Partner Meeting* in Manchester 20.2.2008.
4. *The Management Group* discussed the principles and practices of evaluation in Manchester 21.2.2008 and agreed that:
 - the project follows the principles of the evaluation as suggested by the evaluator,
 - each partner will fill in the questionnaire individually,
 - the answers will be requested with names (i.e. not anonymously),
 - open questions serve the needs of the project better than “ticking the boxes”,
 - no alterations for the questions in the draft questionnaire were needed,
 - the deadlines for the answers will be: 15.4.2008 for the first questionnaire and 30.6.2009 for the second questionnaire,
 - the findings will be presented on the Versailles University website and in the Partner Meeting in Tallinn and MG meeting in Tampere and
 - that the interim and final evaluation reports for the Commission will be included in the public TULIP website.
5. The partners gave their *answers* through web. 16 responses from 13 partner institutions were received; each institution was covered; most partners answered all the questions. The answers can be a source of ideas for further work in TULIP that the partners can return to. It is necessarily not relevant to view all of them at the same time, but to look at the slides that are relevant in certain phases of the project.
6. The evaluator *collected* the answers as they were written on the project website. The collection of answers is a wide and versatile source of ideas and tools for the implementation of the project.
7. The evaluator *analysed* the answers and produced a presentation with the key findings.
8. The evaluator *presented* the outcomes of the first part of the enquiry in the partner meeting in Tallinn 6.11.2008. The findings were discussed and they are at the disposal of the Coordinator and partners in the future implementation of the project.
9. The evaluator finalised *the interim report*.

2 FINDINGS OF THE FIRST ENQUIRY

2.1. PARTNER MOTIVATIONS AND EXPECTED BENEFITS

(The questions to sharpen the expectations of the project partners)

The recruitment of partners was premised on the idea of two groups of partners: some partners were to be experienced in the cooperation of universities and trade unions and others newcomers to this kind of activity. The partners are recognisably conscious of their different roles. Another favourable starting point is the fact that the partners seemed to join the project with their responsibilities for their membership in mind. Their basic mission is to support the good of their members or clients.

The allocation of resources for such a project seems justifiable in the situation, where the partners claim that they had not found chances for European cooperation in this area. The answers also cover the typical motivations for any European projects, e.g. cooperation and contacts, finding good practices and ideas. The trade union partners are especially motivated to get acquainted with lifelong learning issues and APEL & RPL. For the university institutions, also the potential education markets seem to be an interesting possibility.

The motivations are a mix of institutional and personal professional interests. No doubt, the motivation base is stronger where the two of these support each other.

“We are collaborating with different actors of economic and social environment, among which companies and trade unions.”

“Since ... the trade unions and universities are not in close cooperation”

“I joined the project to try to gain a greater understanding of how we can” support our members more effectively and how we can enhance and diversify our approach to Life long learning in the trade union.

2.2. THINGS TO LEARN

(The question to raise the awareness of the learning objectives)

The main issue of the project is the trade union-university-partnership. The partnership wants to learn about the philosophy, principles, models, managing and practices of the versatile companionships that these parties construct. The notion of the partnerships in their social contexts is also referred to. Understandably, the higher education institutions want to know more about the logic of trade unions and vice versa. The key angle of the project is lifelong learning that seems to be a special activity also in the TU/HEI partnerships.

Interestingly, some partners emphasise that taking part in a European project will give them a chance to learn at home. Allocating staff time into the project is a legitimate basis for the construction of a learning environment. More obvious answers name the will to bring the European agenda into national discussion and

the use of the solutions and practices of other countries for development in home country.

"I plan to learn, how partnership between universities and trade unions can be developed, which models can be used. "

"... more about the TU culture and their attitude to LLL."

"We believe that there is more than one model for lifelong learning and we need to determine what might be appropriate for our particular circumstances. "

2.3. WAYS OF LEARNING

(The question to enhance relevant use of the various learning modes)

The European projects are fundamentally fora of interaction. The partners clearly understand the relevance of the exchange of experience, collaboration of colleagues and confrontation of approaches. As professional experts in their fields, the partners are able to list the typical formal and informal ways of learning.

Not unnaturally, many of the ways of learning that are mentioned, refer to learning at work. The partners plan to test their ideas, pilot models and propose projects that as such shape practical learning environments. Meeting local trade unions activists is a key activity both for the interaction, promotion of new practices and professional learning.

"By the collaborative working of academic people and union activists"

"... learn from the various mistakes we make along the way"

"testing out some of the ideas"

2.4. PARTNER EXPERTISE

(The question to encourage the partners to make use of their versatile expertise for the project)

The project key content determines the general expertise of the partnership: trade unions and university lifelong learning. The partners also name special themes in these key areas, like women's networks and the work for the excluded in the labour market sector as well as cooperation with SME's and in-house training in the continuing professional training market. The experience of cooperation between TU's and HEI's differs in line with the basic partner role.

In addition to the general expertise, individual partners are experienced in many relevant professional fields. These include quality assurance, financial expertise, structural and policy issues as well as law and human resources. In the Tallinn meeting the partners were strongly recommended to make use of these specialisation profiles for the benefit of the project.

“Knowledge concerning trade union movement”

“Development of ULLL projects”

“APEL, quality, accreditation”

2.5. KEY NETWORKS AND PROJECT ACTIVITIES

(The questions to attract the partners’ attention to the various stakeholders and operations that could be useful in the TULIP project.)

The partners coming from the trade unions and the universities each carry their relevant networks and experience. The networks cover the institutional, professional as well as the regional, national and European. On the other hand, the typical present-day expert work is no more carried out in isolation from other working life organisations. The partners’ everyday work consists of cooperation projects in various forms.

Some university employees take part in in-company training projects and management development programmes. Quite a few of the partners are involved in national initiatives and European projects. These cover e.g. themes like quality assurance, lifelong learning, accreditation, volunteering, work in Europe and workers’ participation.

“European Metal Workers Union networks”

“Research network on Adult Education”

“Network of the LLL institutions”

2.6. TULIP FOR THE INSTITUTIONS

(The question to support the integration of the project development into the missions and activities of the partner organisations))

The expected answers about the objectives of the institutions deal with the finding of knowledge, finding new contacts, construction of relations, professional collaboration and construction of networks. We can also read again the general aims of the project: consolidating lifelong learning in the agendas of the universities and trade unions and launching the accreditation of prior experiential learning APEL. Bringing in the quality culture into the institutions widens the perspective essentially.

Some partners are able to make concrete their ideas of how their institutions could make use of the project. The university partners want to widen their provision of programs and awards. Some of them plan to modify their internal structures for the benefit of lifelong learning. The trade union partners stress the final aim of supporting the ‘underrepresented’ with help of the outcomes of the project.

“Our support to working women and men who have missed out on educational opportunities in the mainstream schools system “

“... enhance the quality culture in my university by focussing on the communities’ needs”

“Contribution to European activities”

2.7. MAKING USE OF THE RESULTS

(The question to promote the exploitation of the TULIP outcomes in the home organisations)

The partner organisations have a key role in the exploitation of the outcomes of European projects. It will be optimistic to rely on the effects of dissemination unless the partners themselves will find a way to embed the results in their own organisations. Again, we could find two different groups of partners, those who planned to exploit the results so as to launch a new set of activities and those who were to redesign their offer. Reports, monographs, MA student thesis as well as fora and workshops are the typical answers you would read in the answers to such a questionnaire.

At the institutional level, the partners plan to find ways to develop their projects. The universities are also active in searching for research possibilities. At the national level, both groups of partners want to influence the political agenda through lobbying.

“... to shape the policy of... education programme “

“a great starting point for some national research and for starting some programs of LLL”

“Taking the results and ideas coming out from TULIP project into the product development discussions”

2.8. STAFF DEVELOPMENT AND INVOLVING STAFF

(The questions to widen the participation into the TULIP project from individual to institutional))

Most partners see staff development as an inherent function of the local activities of the project. Availability of materials and the partner oneself are the easy and practical solutions. Some partners have serious plans of organising conferences or training programs. Obviously, taking part in a project itself is a staff development activity as such.

Involving staff covers a wider perspective than pure staff development. Some partners are organising part of the project activities with their colleagues. Typical activities are the search of references and experts and teacher training and other delivery. MA students are also a possibility in the widening of participation. Some partners think that it will be realistic to recruit the colleagues into the next phase of the project.

“we will be able to use the real examples”

“in some LLL training programs”

“participate in the extension of this project”

2.9. INVOLVING NETWORKS

(The question to contribute to the wide involvement of the key stakeholders into the TU/HEI cooperation)

The networks that the partners want to get into contact with are both internal to the project (TULIP partners), internal to the institutions (university colleagues and institutions), and external to them (crossing the TU/HEI boarder, voluntary and employer organisations and work councils).

Involving external people can take place with both materials and meetings. Aiming at common plans and strategies seems to be a hard objective. Making the link through the support to the key colleagues in the networks is one of the suggested routes to companionship. The breakthrough could then be followed by the snow ball effect.

“Develop a strategy with a colleague from the trade union to support him”

“‘snow ball principle’”

“We aim to empower our members”

2.10. PROMOTING DISCUSSION

(The question to advance the status of the TULIP project themes in the institutional, national and European agendas)

The aim of promoting discussion about the development of the university trade union relationships is understood to reach all the levels from institutional to national and European. The main approach seems to be going into the situations, where the key people meet otherwise. These include senate bureau meetings, lay member briefings and ‘open doors’ for discussion during the so called University Days.

Universities plan to connect the promotion of discussion into their learning structures. The trade unions on the other hand want to link it into their lobbying activities. Collecting a group of supporters to be ‘a vanguard’ for the intensified cooperation is a shared aim.

“lay member briefings “

“Senate Bureau meetings “

“an “Open Door” for discussion during the University Days”

2.11. DISSEMINATION

(The question to promote the exploitation of the TULIP outcomes in the home organisations)

The partners demonstrate their readiness to consider the dissemination activities already in the beginning of the project. They are able to mention many tools for dissemination (website, leaflets, articles, monograph, HEI newspaper etc.). The list of potential events is also versatile (conferences, round tables, presentations, seminars, project fairs etc.) Also the different levels of dissemination are well-known in the partnership (institutional, national, European).

The expertise and experience of the partners becomes evident when they add their viewpoints to dissemination. They aim at the development of their services and the integration of the project results into the activities, projects and policies of their organisations. The partners are going to design dissemination plans during the later phases of the project.

“do a planning for dissemination”

“through other training activities”

“... our networks to integrate the project results into their activities”

2.12. LIFE AFTER TULIP

(The question to widen the scope of the partnership over the life span of the TULIP project)

As to the TULIP project itself, the parties want to see the experience and results of the cooperation. Even at the point of the enquiry, some partners want to continue the cooperation with or without a project. One option would be to expand the network. Maintenance and development of the TULIP website is one concrete tool to keep the cooperation going.

In their home organisations the partners want the TU/HEI cooperation to become an essential element of their everyday work. Delivering courses and programs, developing methods and tools and continuing research in the theme are examples of the expectations that the universities have. They also want to develop the structures of their organisations for the benefit of this kind of cooperation. The trade unions aim at the establishment of the companionship within lifelong learning. Both parties see the importance of the continuation of the international interaction.

“We hope that this will be the start of a long and fruitful relationship.”

“... what opportunities arise during the project”

“Expanding the actual network”

3 THE EVALUATOR'S APPRAISAL AND SUGGESTIONS

My estimation and recommendations are based on the answers that the partners gave to the first part of the enquiry. I have also had the chance to make myself familiar with the paperwork and the website of the project. Giving me the chance to take part in the partner and management group meetings adds to the TULIP openness and ability to cooperate. All this has given me good conditions to implement the evaluation.

My general impression is that the TULIP project is carefully planned and organised. The Contractor and the Coordinator are equal to their tasks. The composition of the partnership is appropriate and the individual partners are experienced and committed to realize the aims of the project. The meetings have been well-organized and the communication between the Coordinator and the partners functions fine. The project is well on its way to accomplish the intended outcomes.

In my presentation about the evaluation in the partner meeting in Manchester 20.2.2008 I raised three key features that the TULIP project is working for: learning - networking - development. The partners' feedback, both in the answers to the questionnaire and otherwise, confirms that the process of the project has already been a cooperative learning environment that will promote the rooting of the university/trade union partnerships.

Below you can read my detached projections to the separate questions. First I describe my impression on each of the issues. In the italics I try to bring possibilities for further advancement to the attention of those involved in the project. Obviously, the partners have already taken action in line with the suggested fine-tuning after the discussions in the partner meeting in Tallinn, partially already after their answers to the questionnaire.

Partner motivations & expected benefits

The partners are aware of the aims and objectives of the project. They have clear motivations for their participation. They are able to analyse the expected benefits both at the personal and the institutional level.

The good starting point for the project stems from the expertise and experience of the partners as well as the careful coordination of the project. While the starting point is better than in many European projects, the Coordinator and partners need to be conscious of their expectations in relation to the agreed project objectives and ready for modifications where necessary.

Things to learn

Whereas the partners have positioned themselves properly in relation to the aims of project, their estimation of their potential learning in the project seems somewhat overdone, especially given the short timescale of the project (two years). They have very ambitious learning objectives. The practical intensive work situation in the home organisations will probably not give the partners the chance to learn everything that

they plan to.

For practical reasons, it would be appropriate that each partner reflected his or her learning objectives with the project aims. The vivid and interactive process of the project may have caused too optimistic expectations compared to the hard pressures of daily work.

Ways of learning

While somewhat optimistic of their learning outcomes in the project, the partners have good understanding and knowledge of various learning methods. It is encouraging that they are also acquainted with the versatile forms of learning at work.

The partners do not necessarily need any special support by the Coordinator for their learning. The embedding of the project outcomes would probably gain from combinations of learning and piloting the discovered viable practices.

TULIP for the institutions

The links from the project into the daily lives and the development of the institutions do not go by the board in the answers. As a matter of fact, the partners have some quite innovative ideas of how to exploit the TULIP outcomes. Because the partners have different starting points for the TU/HEI partnerships they are also unequal in their taking into possession of the exploitation of the project.

All the partners will benefit from some more thinking of how to concretise the benefits for their organisation. This is especially the case for the newcomers into the TU/HEI companionships. See also the comment above.

Partner expertise & key networks and project activities

The Coordinator has been successful in finding a good composition of partners. They have the relevant expertise and networks for the implementation of the project. The project has an adequate proportion of practised and newcomers in the TU/HEI companionships. In addition, many partners have some relevant specialisation.

The Coordinator could enrich the project learning and deliverable outcomes by encouraging the partners to use their specialised expertise during the process of the project.

Staff development & involving staff

It is not rare that the European projects suffer from the cooperation at the individual rather than institutional level. The TULIP project partners have promising ideas for involving other staff and staff development.

Making the preliminary ideas more concrete and carefully implementing them will bring good results both

for the dissemination of the project and the partner institutions.

**Involving networks
& promoting discussion**

It is obvious that the partnership has the necessary connections to some essential networks. Some partners also have useful starting points for the involvement of the key stakeholders. Still, the general picture is not as determined as e.g. in the staff involvement.

The project plan and the enquiry answers include practical elements of how to involve relevant networks and to promote discussion. Not unnaturally, the importance of these will grow towards the end of the project. The Coordinator and partners could have a focussed discussion about the possibilities to carry the message for wider audiences. The TU/HEI partnerships are in the core of the TULIP project and the fruits of the pilot work should be disseminated effectively.

**Dissemination
& life after TULIP**

Even at the early phases of the project, the partners have preliminary ideas and elements for dissemination. They are also able to consider the possibilities for future enhancement of cooperation after the project itself has come to an end. It is promising that the partners do not only think about the project continuation, but also the chances of mainstreaming the activities and procedures in their home organisations.

Even with a good start for the consideration of the dissemination and continuation of the activities, it is important that the Coordinator will remind the partners to implement the ideas in the short time frame of the project. The project outcomes and the events of the latter part of the project will be the core of these activities.



APPENDIX: TULIP EVALUATION, FIRST ENQUIRY

YOU

- 1) Your name
- 2) Your employer
- 3) Your role in the organisation

A. TULIP FOR YOU

- 4) Why did you join the TULIP project?
- 5) How do you plan to benefit from the TULIP project professionally?
- 6) What do you plan to learn in the TULIP project?
- 7) How do you plan to learn in the TULIP project?

B. YOU FOR TULIP

- 8) What is your special expertise that the TULIP project and partners can benefit from?
- 9) What are your key networks that you plan to make use of in the TULIP project?
- 10) Are you involved in other projects (in your institution, national or international) that could support TULIP?

C. TULIP FOR YOUR ORGANISATION

- 11) What are the activities or features of your institution that you want to develop with the help of the TULIP project?
- 12) How do you plan to make use of the results of the TULIP project in your university/trade union?
- 13) How do you plan to use TULIP as a tool for staff development?

D TULIP FOR THE NETWORKS

- 14) How do you plan to involve colleagues in your university/trade union into the TULIP project?
- 15) How do you plan to involve colleagues in the partner institution (trade union/university)?
- 16) What are the concrete links outside the university/trade union that you want to strengthen with the support of TULIP?
- 17) How do you plan to promote discussion on trade union - university cooperation?

18) How do you plan to disseminate the products of the TULIP project?

LIFE AFTER TULIP

19) How do you plan to continue the cooperation between the universities and the trade unions after the TULIP project?

20) How could the TULIP project continue its work?

QUESTIONS FOR THE END OF THE PROJECT

You shall be asked to answer these questions close to the end of TULIP project. Have a look at them, but there is no need to try to answer now!

TULIP outcomes

21) Which of the TULIP products and outcomes do you find most useful?

22) Which of the TULIP products and outcomes do you not find so useful?

20) What tools are you missing?

21) Did TULIP produce some outcomes that you did not expect?

TULIP activities

22) What were the most useful and innovative methods and working practices in TULIP?

23) Which methods and practices did you not find so useful?