Learning brokerage
Building bridges between learners and providers

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Learning brokerage offers a means to tackle the UK's 'learning divide', by helping learning providers to reach adults excluded from learning. This report presents early findings from a study on how brokerage works in communities and the workplace, and implications for post-16 learning and skills provision. Based on a literature review and wide consultation, it analyses the key functions and stages of learning brokerage, pointing to conditions that promote or hinder success. It challenges assumptions about the kinds of learning opportunities most likely to attract and support 'new' learners and includes a directory of examples.

Learning Brokers Research Project

The Learning and Skills Research Centre

The LSRC is an independent centre for strategic research to inform long-term policy development and to improve practice in post-16 learning. Its mission is 'to create a strong body of evidence from rigorous research, focused on creative, critical and innovative thinking, models and solutions for the long-term development of post-16 learning'. Its remit spans a wide range of learning types and settings, including formal and informal learning and learning provided in schools, colleges, community-based settings and the workplace. The Centre's major research themes cover pedagogy, participation, vocational learning, skills and workforce development, curriculum, and the organisation of learning.

The Learning Brokers Research Project

This project was commissioned to identify different forms of learning brokerage and effective strategies for good practice to engage 'non-traditional' adult learners. The interest in brokerage arises from its potential to stimulate new demand, both to tackle skills deficits and to improve social inclusion and equity. Brokers include a wide range of organisations and individuals who act as catalysts or agents of change, inspiring adults to take up learning and helping them to succeed. The research objectives are to:

- review the use and application of the term 'learning broker'

- identify key characteristics of brokerage practice and the benefits for potential learners

- develop understanding of the patterns of interaction between (potential) learners, brokers and learning providers in different contexts

- explore effective approaches to brokerage in relation to specific communities and groups

- identify barriers to effective brokerage and areas for further support

- investigate the role of ICT and its impact on the relationship between learners, brokers and learning providers

- contextualise the development of more widespread and coherent networks of brokers within the contemporary policy environment

- assess the wider implications for learning providers.

This report was prepared by a research team at the Institute for Access Studies, Staffordshire University, who are conducting the main research project. Further reports from the team will be published in 2004/05. In addition, a report has been prepared by researchers at the Business School, University of Hull, and at the Human Resource Development Unit, Leeds Metropolitan University:

Thursfield D, Hamblett J and Holden R (2004).
*Learning brokerage in the workplace:
some preliminary reflections.* LSRC.

Learning Brokers
Research Project

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Interim report:
work package 1

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Summary

Introduction

- Learning brokerage is a potential means of addressing and reducing the learning divide which continues to exist in the UK. But at present it is an unexplored and under-conceptualised topic.
- This report is the first outcome of a major research project on learning brokerage. It details the findings of stage one of the research which was essentially a scoping exercise to clarify what brokerage is and to establish a framework of how it operates.
- This stage has employed a mixture of methods: a survey, practitioner panel, literature review and participative conference.
- An integral part of the research is the use of participatory methods. The involvement of practitioners and professionals enables the research to draw on expertise and knowledge that already exists on brokerage, and ensures that the research reflects key issues.

Key findings

1. Defining learning brokerage

- Consultation with practitioners indicated that focusing exclusively on the role of individuals within learning brokerage was inaccurate and misleading.
- The term 'learning broker' is not widely recognised, and in some cases was seen as inappropriate. Moreover, it was felt that to conceive of the learning broker as a generic 'job' was misleading as it involves a range of roles and activities.
- What does exist is a process of learning brokerage undertaken through a network or chain of individuals and institutions.
- The essence of brokerage is to mediate between learners and providers. This involves being able to both interpret the needs of potential learners and to understand and influence the bigger picture, in terms of what learning opportunities could and should be available to them.
- Learning brokerage is also context specific, and operates differently in the four key domains under study: community, work, educational institution and voluntary sector.
- Working across the four domains is desirable and a key role of learning brokerage. However, this requires robust partnerships that can be challenging to develop and sustain.
- Three levels of brokerage exist: very informal (suggestion and comment), more formal (providing advice) and strategic (working to change structures).
- Brokerage can be both paid and unpaid.
- Brokerage is a long-term process, fluid and dynamic in nature.
- The main barriers to learning brokerage include structural factors (eg poverty) which actively marginalise certain individuals from learning, short-term funding, lack of resources, and limited conceptions of significant learning by policy-makers and funding bodies.

- Four key factors are essential to the development of learning brokerage nationally: recognition and dissemination of good practice, adequate and systematic funding, improved opportunities to work cross-sectorally, and consultation with potential users.
- Although there is much literature that is tangentially relevant to brokerage there is very little which focuses on brokerage itself.

2. Developing a brokerage process framework

- From the literature a framework has been developed to chart the key activities of learning brokerage, all of which (may) involve multiple networks.
- The six stages are listed below.
  - *Understanding the current situation*. This stage involves undertaking essential groundwork to identify who is currently learning and what, and who is providing the learning opportunities and what are the gaps. Key activities within this stage include research, targeting, consultation and collaboration.
  - *Gaining entry and building trust*. At this point in the process access to potential learners is sought and relationships of trust developed. This stage involves ongoing consultation, negotiation with gatekeepers, exploring and establishing informal links, and establishing relationships with formal brokers.
  - *Making learning meaningful*. This stage involves working at a deep 'identity' level with potential learners, and key processes include engaging with potential learners to develop informed understanding, linking learning opportunities to the context of their lives, developing awareness of structural barriers, using strategic approaches such as informal learning, and being tactical and starting from where people are at.
  - *Identifying the right learning opportunity*. Successful brokerage involves raising potential learners' awareness of meaningful and appropriate learning opportunities and also helping providers to develop appropriate provision. Brokerage may help learners down formal pathways or, more informally, help them to create the pathway themselves.
  - *Promoting learning success*. The brokerage process extends beyond entry into a learning situation and includes ongoing work with learners and providers (eg developing appropriate pedagogy and curricula, and building social networks of learners).
  - *Addressing organisational issues*. Brokerage implies and requires organisational development and change. Key issues identified are capacity building for all those involved in brokerage, partnerships and collaboration, using IT effectively in brokerage, and monitoring and evaluating brokerage.

Conclusions and next steps

- Our research has revealed that brokerage is established and widespread – we have only uncovered the tip of the iceberg.
- It has also established a conceptual framework to explore brokerage.
- In the next stage of the research, through nine case studies, an in-depth examination into learning brokerage practices in different settings will be carried out. Key issues to explore include:
  - how is brokerage enacted on a day-to-day basis?
  - what constitutes brokerage success?
  - how does brokerage differ from other processes?
  - what is its particular contribution to engaging educationally marginalised and excluded adults?

1. Introduction

1.1 Background

Learning brokerage has been posited as a possible means of addressing the 'polarisation in our population between those who have succeeded and those who have not' (LSC 2003: p2). It is seen as a means of building bridges between potential learners and providers to reach those who have remained excluded from learning. It is thus a timely, but still somewhat unexplored and under-conceptualised, topic. In order to facilitate its future development, a major three-stage research project has been commissioned by the Learning and Skills Research Centre on this key subject. The aims of this project are to:

- develop definitions of learning brokerage
- bring together existing knowledge on the subject
- identify different forms of brokerage
- identify effective strategies for good practice to engage educationally marginalised adults in learning
- produce effective criteria and workable models.

For the purpose of this study brokerage has been defined broadly as taking place in a variety of contexts (eg the workplace, voluntary sector, communities and the education sector) and the research is designed to reflect its cross-sectoral nature. This report presents the findings from stage one of the research, which by a combination of survey, consultation and literature review explores the meanings and stages of learning brokerage, establishing a context for more detailed and focused research. The report also discusses the implications for these later stages of the research, in particular Work Package Two.

1.2 Policy context

Before detailing the research it is necessary to analyse the policy context within which it fits. Why is learning brokerage important, and why now? Lifelong learning is at the forefront of much public policy in many countries (eg Canada, the USA and the UK). In the UK this has been driven by recognition that there is not just a 'learning divide' (NAGCELL 1997) but a learning gulf in our society, resulting in serious skills gaps which hamper development and regeneration and undermine 'productivity and competitiveness' (DfES 2003). Thus the need to engage adults in learning has many drivers: notions of equality of opportunity and social exclusion, but also firmly economic imperatives. As Charles Clarke argues in *Success for all*:

> *The learning and skills sector has never been more important to the Government's agenda than it is today. It is pivotal to our overriding objective to strengthen Britain on the dual and inextricably linked foundation of social justice and economic success.*
>
> (DfES 2002: p4)

There have been many policies and initiatives over the past decade designed to develop more inclusive lifelong learning (eg Kennedy 1997; NAGCELL

1997, 1999; DfEE 1998; DfES 2002, 2003; LSC 2003). Four inter-related policy arenas are apparent in the UK: policies to widen participation, policies to increase demand for learning, policies addressing failure in the secondary school system and policies aimed at combating unemployment and increasing productivity. Yet the problem of low participation rates in formal learning is a seemingly intractable one. Existing mechanisms to engage people into learning are not working well enough and other more creative and flexible solutions have become imperative: hence the interest in learning brokerage.

However, there have been a number of assumptions and trends enacted within the policy arena that could be seen to hinder the development of learning brokerage. The first of these is that education is self-evidently good for everyone and that those who do not actively engage with education are choosing not to learn and are thus responsible for their own failure. As Diane Reay argues: 'No longer limited to the advantaged few, education is increasingly positioned within dominant discourses as the new panacea for the masses' (2001: p336). This view has been critiqued by some, including participants in this research, as a 'middle class' value which is almost being imposed onto marginalised groups with little recognition of the stark realities they may face. Moreover, it can be argued that such a conception of learning erases much of the valuable work in the voluntary and community sector where learning is often a by-product of efforts to address particular problems and issues, rather than an end in itself. The aim of such 'inadvertent' learning is rarely progression to formal learning and a successful outcome is differently conceptualised. However, there are hopeful signs that the policy literature is becoming more alert to this issue. For example, *Learning cultures* (NAGCELL 1999) focuses on building community capacity, advocating more support for those working in the voluntary and community sectors, and *Successful participation for all* (LSC 2003) recognises the significance of 'contexts of motivation', such as being a parent or a tenant, where the drive to learn is not the learning experience itself but the need to effect some form of change.

Another problematic assumption, which emerges in the policy domain, is that learning equals formal accredited learning. This results in the labelling of very many people as 'non-learners'. The reality, however, is far less clear cut: it is impossible to be a non-learner, as learning takes place all the time through our children, from our friends, via television and so on, but it is very easy to be a 'non-formal learner'. The 'Learning Curve' is 'designed to equip everyone involved in neighbourhood renewal with the skills and knowledge they need' (Neighbourhood Renewal Unit 2002) but this is all too often interpreted as a learning requirement on the part of the community rather than on all parties. There can be a danger that informal learning is either invisible or viewed as insignificant. Conversely, there can sometimes be a tendency for those who value informal learning to downplay the benefits of institutionally based learning and formal qualifications. Again there is some evidence of a sea change on this question. In *Success for all* the DfES (2002: p28) has acknowledged the need to develop a framework that 'recognises and values learning which does not lead to a qualification yet demonstrates distance travelled'. Nevertheless, this travelling metaphor still seems to enshrine progression and the need to 'move on' and become someone different, and

this may not necessarily translate well for the very groups the government is most anxious to reach. However, it should also be acknowledged that the debate about accreditation is a complex one. Many learners wish to have their investment in informal learning quantified and indeed are seeking to progress to formal qualifications and the job opportunities associated with them.

As suggested earlier, there is a strong coupling together of social justice imperatives and economic imperatives in the discourse on lifelong learning. Thus the 'non-learner' is positioned not only as depriving themselves but also as holding back the country and its success. In fact the economic factor has tended to be dominant in tying these strands together and the promotion of learning has been linked much more explicitly to economic benefits than to personal and social gains. However, there is of course a justice element to such economic progression in terms of potentially freeing people from unemployment and insecure and low paid jobs.

Workforce development underpins a number of policies and the emphasis is on developing 'productivity and employability' (PIU 2001: p3) in order to promote and meet business need. The debate about 21st century skills (DfES 2003) is couched predominantly in terms of employability, moving from a 'job for life' to 'employability for life'. The onus is on 'the broad foundation skills needed for sustainable employment' (p6). However, it is significant that within the same White Paper adult and community learning programmes are positioned as 'an integral part of wider learning opportunities' (p21), making this an apposite moment to focus on such areas.

The Learning and Skills Council's (LSC's) Widening Adult Participation Strategy takes up this motif, and along with its focus on skills shortages and their impacts on the economy also sets learning in a much broader context. The strategy is interested in the connections between learning and personal and community development: 'Failure to develop people's talents to the full reduces opportunities for personal satisfaction and wastes individual potential, restricting their contribution to family and community life' (LSC 2003: p6). However, there are contradictory elements at play within this document and more generally in the policy domain. Although the need to reject the student deficit model is explicitly emphasised, there is more emphasis on aspiration and motivation than on the processes of social exclusion. The problem is still predominantly situated with the individual and not with the circumstances under which they are living and struggling. There are many hopeful indications within the policy literature that a climate conducive to lifelong learning may be emerging. However, these still tend to be undercut by deep-seated and counterproductive assumptions about what learning is and how and why it should be accessed.

It is in this policy context, where both learning for citizenship and learning for employability are emphasised, that the question of bridging gaps between accredited/non-accredited and community/institutional learning has resulted in strong emphasis on partnership working (see DfES 2003; LSC 2003). Brokerage is seen as playing a crucial role here in bringing together disparate and competing factors. It has been particularly highlighted in the workplace,

through the work of 'union learning reps' (DfES 2003) and in 'information and guidance' (LSC 2003). However, there is little sustained reference to non-statutory providers with respect to brokerage and little acknowledgement that brokerage has existed in various unacknowledged forms for a long time. Although the term learning broker is relatively new, and, as we shall see, little understood, the practice of working as intermediaries between potential learners and providers or supporting local people to address their needs through learning has long been a staple of work in the community and voluntary sector. What is new is not brokerage itself but its association with formal education providers and work-based learning. For example, Ufi is a national learning brokerage with a clear interest in work-based learning, union reps and learning champions operating in the workplace, and Partnerships for Progression, funded by the LSC and HEFCE, focuses on educational sectors. There is a danger, which this report will highlight, that a two-tier system may develop in which voluntary and community work is marginalised and underfunded. Any discussion of learning brokerage needs to keep these questions of historical provenance and power differentials in mind.

This report emerges from the policy context analysed above. Its overall aim is to draw together and analyse existing knowledge about learning brokerage and its practice and in doing so raise the profile of this issue. The research it details has by its methodology attempted to address some of the problematic factors so far outlined. It recognises that brokerage is an important concept whose time has come and that there is a great deal of tacit knowledge about the practice of brokerage which we need to tap into. Therefore, the research team has involved learning brokerage practitioners in its discussions through a practitioner panel and participative conference. It also sees that brokerage is not a well-defined concept and if we are to understand what it is and how it works we need to survey those who take part in it as well as examine the literature. Thus this report draws on the findings of a pro forma survey of practitioners across contexts as well as on grey and published literature. As part of the survey process concrete examples of learning brokerage have been collected and developed into a directory of over 80 entries. The understandings developed in this initial report have shaped and guided the collection of case studies for stage two of this research and will also influence the action research to be conducted in stage three, informing guidelines for good practice.

The report is organised into the five sections listed below.

- This introduction.
- Section 2, which describes the research methods in more detail.
- Section 3, which analyses the primary data generated by the pro forma survey and the participative events in order to develop a definition of learning brokerage.
- Section 4, which examines six key aspects of the learning brokerage process which are linked to effective practice. These are:
    - understanding the current situation
    - gaining entry and building trust
    - making learning meaningful
    - identifying the right learning opportunity
    - promoting learning success
    - addressing organisational issues.

    This is primarily literature based, but limitations in the literature are highlighted and important findings from the participative research are included. A series of UK and international examples are included to illustrate these aspects of the learning brokerage process in a range of different contexts.
- Section 5, which draws together the conclusions from phase 1 of the research and introduces Work Package Two.

Appendices 1 to 4 include details of the pro forma survey and its distribution and list participants in the practitioner panel and participative conference. The directory of learning brokerage is included as Appendix 5.

Throughout the report cross-references are made to a report on workplace brokerage produced by Denise Thursfield (University of Hull), John Hamblett and Rick Holden (Leeds Metropolitan University), which was commissioned to supplement this report and is published separately (Thursfield *et al*. 2004).

2. Research methods

The project overall has been designed to combine a range of methods to fulfil the aims and objectives of the research. An integral part of the research process has been the involvement of practitioners and professionals. This has enabled the research to draw on expertise and knowledge that already exists on brokerage, and will be an ongoing key element of the project. Furthermore, the continued involvement of practitioners and professionals ensures that the research reflects key issues. In phase 1 this has been accomplished in a number of ways: by a panel of practitioners and by a pro forma invitation to contribute to the research. The participative element will be continued into phases 2 and 3 of the research. Both of these phases will include further participatory events offering people working in the field an opportunity to come together to discuss findings and key themes emerging from the research. This will enable participants to inform the research and also share knowledge and expertise. In addition, phase 3 will be based on a participatory action research approach that will involve working with four partners to further develop strategies for effective brokerage. As part of this phase an e-mail network and discussion group will be set up to facilitate networking across sectors and sharing of information between organisations and individuals. Feedback from participants involved in the research to date confirms that the opportunity to discuss and share information during participative events is extremely valuable.

2.1 Pro forma invitation

An invitation to participate in the research was distributed across the UK either directly or via key networks in the public, private and voluntary sectors. The pro forma sought views on the familiarity of the term 'learning broker', key characteristics of learning brokers, the advantages and disadvantages of the role, and barriers to effective brokerage (see Appendix 1). In addition, organisations were asked to nominate examples of learning brokers to provide data for a directory and which might be followed up as case studies in the next phase of the research. Over 40 organisations and networks were contacted and asked to disseminate the pro forma electronically throughout their networks (a full list of contacts is included as Appendix 2). For example, the Trades Union Congress (TUC), the National Association of Councils for Voluntary Service and the Workers' Educational Association (WEA) were contacted and asked to distribute pro formas to their members. In addition, pro formas were mailed out directly to institutions and organisations such as HE institutions, FE colleges, learning and skills councils, learning partnerships and local education authorities in the UK. Distribution of pro formas has been an ongoing process throughout phase 1 of the project, and the deadline for return has continually been extended to allow all those contacted an opportunity to respond (distribution was also interrupted by the Christmas holiday period, which may have adversely affected response). However, it should be noted that a number of organisations have been reluctant to disseminate information to their members. All these organisations have been contacted by telephone in an attempt to convince them of the value of the research to their members, but a small number have declined to take part. Without exception, the reasons given for non-participation have been that they

do not think their member organisations are 'learning brokers' and that the research would not therefore be of interest to them. This has been particularly true of umbrella organisations acting as 'gatekeepers' for voluntary agencies. These organisations felt that their members had a shortage of both time and financial resources, and were reluctant to forward anything they thought would represent further work without any perceived benefit. This highlights what has been one of the main difficulties encountered: the unfamiliarity of the term 'learning broker' and the multifaceted nature of the role/process has made the concept a difficult one to explain and 'sell' to potential participants, particularly those acting as 'gatekeepers'. Unfortunately, many of these umbrella organisations are themselves operating on limited budgets, and either charge relatively high fees to distribute information or do not have the facilities or resources to keep electronic mailbases. However, feedback from the practitioner panel and the participative conference suggests that the pro forma has reached a diverse audience throughout the UK. Further examples have been drawn from information provided by the practitioner panel members and conference participants.

Over 90 pro formas have been returned, and a total of 86 examples of learning brokerage submitted. All examples have been collated in a directory, giving brief details of each, together with contact information (see Appendix 5). Copies of the directory were distributed at the participative conference and feedback from this indicates that it is viewed as a valuable resource. Examples have been received from the whole of the UK and include those based in the workplace and in the community. We are aware, however, that there are many more examples of practice that have not been submitted because we were unable to convince people that brokerage is actually an activity they are engaged in, and also that this project is important in relation to the work they do. While this is in part because of the time and financial constraints individuals and organisations are working under, it also relates to the complexity and diversity of brokerage activity and terminology.

2.2 Practitioner panel

A panel of practitioners was established at the beginning of the project. Panel members are drawn from a range of different organisations and will meet regularly throughout the research project. This will enable the research to draw on the expert knowledge of professionals working in the field, and ensure that the research reflects key issues (a full list of panel members is included as Appendix 3). The first meeting of the panel was well attended and all members welcomed the opportunity to meet and discuss some of the key issues involved. An overview of the research was presented and discussed at the meeting, and comments and information provided have been incorporated into the research. Panel members were asked to provide additional literature to inform the research, and as discussed above suggested further examples of brokering practice. In addition, many panel members attended the participative conference. A second meeting has been arranged to discuss the research to date, and also to enable the panel to contribute to the case study selection process. The panel will play a key role in the research, contributing expert knowledge and ensuring the research reflects key issues of practitioners across a variety of contexts.

2.3 Literature review

Phase 1 has involved a selective literature review of key documents. This has given a grounding in some of the issues related to the area and has been used selectively to explore the process of brokering framed around a number of key areas discussed in Section 4.

The review has built on existing Institute for Access Studies (IAS) literature on widening participation. A general search was made of key educational databases using a range of keywords including broker, link worker, advocate, intermediary and change agent. A list of recommended literature was also provided by the Learning and Skills Research Centre. The review has been an ongoing process throughout phase 1 of the research: additional material and grey literature have been recommended and contributed by members of the practitioner panel and participants at the conference, issues raised during the conference influenced the direction of the literature search, and the literature itself directed researchers towards other documents. Specific websites, such as those of the DfES, Campaign for Learning, NIACE, York Consulting and the TUC, were also searched for evidence of activity in the area of brokerage. Dissemination of the pro forma served to raise awareness of the project across a diverse range of organisations and institutions, and a number of people involved in brokering in some capacity contacted the research team, both to provide literature and to offer information on the area.

The review has sought to involve an international perspective on learning brokerage. International submissions have been invited via the International Retention Research Network (coordinated by the IAS and the European Access Network), the European Access Network, UNESCO and the Education Policy Institute in the USA. Although a number of contributions have been received, overall the response has been disappointing. A variety of reasons may have contributed to this poor response. First, the research has indicated that the term is not widely used within the UK and therefore may not be internationally recognised. Second, as discussed above, the concept is a nebulous one, and it has sometimes proved difficult to arrive at an explanation that resonates with individuals and organisations within the UK. Clearly, on an international scale, this problem is exacerbated, and it has been problematic to arrive at a meaningful term and explain the concept at this level. Finally, international dissemination of the pro forma has relied on existing networks focusing on fixed organisations. Learning brokerage activity in the UK is dispersed throughout a variety of contexts and is frequently informal and therefore the international networks used have possibly not been the best way to access information on this type of activity.

2.4 The participative conference

Practitioner involvement was also incorporated into the research through a conference held part-way through phase 1. This is based on a participative model of consultation used successfully by the IAS and reflects our commitment to practitioner involvement in the research process. The event was self-financing and the cost of attendance was kept to a minimum to enable a broad range of people to participate. Similarly, the format of the day

was specifically designed to offer participants the opportunity to come together, discuss key issues, share knowledge and contribute to the research.

The conference was attended by representatives from the voluntary sector, the private sector, learning providers, government agencies and those involved in some form of brokering activity (conference participants are listed in Appendix 4). An overview of the research was presented, followed by two workshop sessions for which delegates were split into smaller groups to discuss definitions and characteristics of learning brokers and, in the second session, the role of the learning broker. Participants were allocated to workshops to ensure a range of views and perspectives in each group. Practitioner panel members who attended the conference were asked to feedback from each of the groups. The opportunity this event and the practitioner panel meetings offer must be emphasised: participants stressed that few opportunities such as this arise and therefore attached a high value to them. Indeed, evaluation of the event by delegates has been extremely positive: participants felt that the day had been of value to them and confirmed that they would welcome the opportunity to attend similar events in the future. Again, issues raised and discussed by delegates during the workshops and more generally have been incorporated into the research findings discussed in the following sections of this report.

3. Defining learning brokerage: the results of consultation

The consultation process provided much significant data on how learning brokerage is both perceived and deployed. The opportunity to focus on brokerage itself and the employment of participative methods generated rich and challenging findings that enable the report to make a significant new contribution to this subject. This section of the report analyses this data and provides a new definition of learning brokerage, how it works, what barriers it faces and the drivers in its future development. This analysis challenges the exclusive focus on the individual, and illuminates the complexity of the process.

3.1 The process of learning brokerage

Consultation across sectors, by means of the pro forma, practitioner panel meeting and participative conference, revealed that the term 'learning broker' was not widely recognised. In some contexts, such as the voluntary sector, it was perceived as inappropriate, conjuring up formal links to accredited learning. Moreover, it was felt that to conceive of the learning broker as a generic 'job' was misleading. The all-inclusive term 'the learning broker' is equally as mythical as that of 'the learner'. What does exist is a process of learning brokerage that is framed and undertaken differently in different contexts. This can best be understood as a process of mediation between potential learners and learning providers of many different kinds: a 'network' or 'chain' rather than the function of an individual or even a single institution. Practitioners recognised that such a process of 'mediating learning relationships' exists and that it should be validated, nurtured and resourced as 'very time consuming and expensive but essential'. Learning brokerage was indeed resource intensive, but: 'in the long term it can save the economy far more than its initial costs'. It was a flexible process with multiple possible benefits: helping people to gain access to other services as well as learning. Those involved in learning brokerage can work with learners to: 'approach their lives on an holistic basis, helping them to address all their problems, not just those that are learning related'. Although learning brokerage was understood to rest on what they described as a rather middle class assumption that 'learning is good for everyone', most saw it as a life-enhancing process:

> It is wonderful to work closely with someone who has had dreadful educational experiences and actually help them rediscover the joy of learning. You also get to see their relatives and children begin to make decisions about going to college or university. Education actually does transform people's lives and it is emotionally uplifting to be part of that process.

3.2 The necessary qualities of successful brokerage

In order for the brokerage process to succeed, those involved in the network must display certain characteristics, at both a personal and institutional level. There was a high degree of consensus on these qualities and they included factors such as being 'trustworthy', 'empathetic', 'responsive', 'flexible',

'knowledgeable' and 'supportive' and less emollient aspects such as being 'challenging' and 'realistic'. The notion of 'translation' and 'interpretation' was placed at the heart of the brokerage process. Brokerage had to understand the 'coded language' of the potential learner about their learning needs and desires and pass these messages on to educational providers. It also had to understand the complexities of the situation the learner might enter into and communicate them effectively. Clearly brokerage implied a wide range of knowledge and therefore could only be delivered by teams and networks, not by one person, however well informed. Brokerage was Janus-like, needing to face in two directions at the same time, understanding both 'the learner's world' and 'the bigger picture'.

3.3 The context-specific nature of learning brokerage

Practitioners emphasised that brokerage must be understood as context specific. There appear to be four key domains in which brokerage takes place: community, work, educational institution and voluntary sector. Within each domain, different elements of the process are emphasised and prioritised as the table below illustrates.

Community	**Work**
Informality	Status and influence
Ground-up	Powerful networks
Grass roots knowledge	Employer demands
Educational institutions	**Voluntary sector**
Linked to infrastructure (eg admissions and lecturers)	Working with target groups
	Feeding into provision
Changing provision	Creativity and 'wrapping' learning

Working effectively depends on identifying the appropriate context-specific 'rewards' and 'incentives' for both individuals and organisations. It is also dependent on generating different forms of credibility and bringing different forms of 'added-value to the dialogue'. Thus, in a community setting, someone practising learning brokerage is seen as 'a Pied Piper who responds to communities at a grass roots level', working bottom *up*. Here the emphasis is on building learning opportunities through close informal relationships and on proving credibility by demonstrating long-term commitment to the local area. In the context of work-based learning brokers 'need to be able to understand the needs of the employer' and the process is more top *down*. Although it is vital to engage employees and unions as well, brokerage in the workplace needs to influence decision-makers and demonstrate and employ 'clout' if it is to succeed. Access to others in power in the sector adds value to the process. Working in the context of educational institutions depends on making effective links *across* the institution, weaving brokerage into the existing infrastructure, but also persuading colleagues to make changes in provision: 'it has required intradepartmental working in the colleges, this is not always easy!'. Credibility may be reliant on understanding the constraints colleagues are working under, but added value comes by providing new pedagogical and curricular approaches. Brokerage in the voluntary sector builds on its knowledge of target groups, helping them to gradually feed *into*

provision. Here added value may take the form of specialist knowledge such as creative practice, employed to both engage the potential learner and prepare them for more mainstream provision.

Working across these four different domains was seen as possible and desirable, but requires 'robust partnerships' which are difficult to develop and sustain. The different domains are not only different from one another but 'divided' from each other by different values and ways of working. 'Communicating' and 'breaking down' such divisions was seen as a key role of learning brokerage. An underlying problem was the lack of validity accorded to local and grass roots level knowledge, which might be initially courted by educational institutions but ultimately 'cast aside'. The voluntary sector, too, shared this experience of being consulted but not really listened to.

It was suggested that there are three different levels of brokerage: very informal, taking the form of suggestion and comment, more formal, in terms of providing advice, and strategic, at the level of working to change institutional structures. Learning brokerage can be both paid and unpaid and the same person might operate at all three levels of brokerage according to the context they were in. Learning brokerage was thus a 'dynamic' process and understood as fluid rather than fixed. Whatever the context, brokerage was seen as 'a long-term process', one which consists of many 'small steps' and 'building blocks' towards 'learning engagement'. Such initial engagement was seen as the most difficult and labour intensive, yet did not fit neatly into funding regimes. One of the key functions of learning brokerage was to make a bridge between such tentative early steps and the accredited learning offered by institutions, 'scaling' learning to fit the learner. In the workplace, too, the hardest step was entering the learning centre. The issue of progression was a key one, but fraught with potential dangers:

> *Once the learner has been engaged there is a constant struggle to find suitable routes of progression that the participant feels comfortable with. This involves considerable time and effort trying to tap into the available funding streams and trying to overcome the 'Old Boys' Network' that seems to be in place in the fields of education and training.*

The consensus was that learners have to want to learn, but providers also have to want to teach, in ways that are appropriate and accessible. Brokerage was seen as a catalyst for change, at an institutional as well as an individual level, 'sparking off chains of learning'. Such change had to be responsive to differences among learners:

> *The lack of readiness within the education sector to provide effectively for disabled learners will affect the ability of learning brokers to support disabled learners in achieving their personal goals.*

The building of learning capacity was not only an imperative for the learner but a responsibility for the institution.

3.4 The barriers to learning brokerage

The learning brokerage process is recognised as effective because it 'reaches parts others cannot' and effects 'negotiation' where both potential learners and learning providers are made aware of 'new ideas'. However, practitioners were also keenly aware of the barriers that exist. They provided a political analysis which is somewhat lacking in the literature, recognising potential learners as often actively marginalised by such factors as poverty, unemployment or racism, rather than being simply passively 'hard to reach'. The consequences of such marginalisation were producing 'generations of non-achievement' in some geographical areas and among some sectors of the community, with negative experiences of formal learning which were difficult to break down. 'Culturally sensitive services' appropriate to the life experience of potential learners were essential to address this situation. Learning brokerage required time and local commitment to grow, and reliance on short-term funding only created a 'parachute in/parachute out factor' which alienated communities. Those engaged in brokerage in marginalised communities were perceived as often set up to fail: overburdened with impossible mental, physical and emotional demands and expected to be 'all things to all people'. They often 'feel like they are working in a vacuum', unable to deliver effectively both because they have few resources to support them and because the rest of the system is inimical to their work. Significant and sustained funding and resources were regarded as the crucial factor in developing effective learning brokerage: 'The government need to recognise the value in the long term of this work and be prepared to invest longer term'. Depending on the short-term unsupported goodwill of individuals only produces high staff turnover and fractured brokerage relationships.

Learning brokerage was also seen as constrained by limited conceptions of 'significant learning' among policy-makers and funders. 'Distance travelled is not always measurable in terms of Level 2 or 3 qualifications!! We need a more qualitative approach.' Learning brokerage was attempting to squeeze new and more dynamic and situated modes of learning within an 'outmoded frame' of educational provision. There is an unresolved tension between 'a credentialist system and a population of learners with learning capacity who can access learning when they need it'. To address this situation a fundamental shift is required in which 'everything should count as learning'. In community and voluntary sector contexts, there was lack of fit between the more informal and organic processes of learning brokerage and the bureaucratic mechanisms of funding and evaluation. Externally imposed measures of success were not always 'meaningful' and at worst could 'destroy the trust' which the learning brokers are trying to build up with potential learners. When working with marginalised communities, engaging very small numbers can constitute a triumph, rather than a failure which should be penalised: 'community learning needs to be a gentle, safe experience not a number crunching exercise'.

For those learning brokerages which were more linked to educational institutions, survival imperatives, again tied to funding, 'competition' and narrow institutional loyalties, made brokerage networks and partnerships difficult, and hierarchical relationships prevented them from 'working flexibly'.

Educational institutions were perceived as 'operating like factories', with staff who constructed non-traditional learners as 'problems' and found it difficult to 'work across boundaries'. In work settings learning brokerage could be stifled by 'not getting access to the right people in the management chain of command' and by narrow formulations of what constitutes valuable skills:

> *Learning representatives need to continually update their knowledge of courses available and at the moment there is no statutory time allocated to this service. The role depends very much on the policy of the company and the attitude of management towards personal rather than job related education and training.*

The problems of non-unionised small businesses were also particularly highlighted as they may lack the resources or the levers to become receptive to learning brokerage.

3.5 Drivers in the development of learning brokerage

Learning brokerage was seen as intrinsically linked to agendas of widening participation, social inclusion, economic regeneration and neighbourhood renewal. It has: 'a crucial role in supporting the development of citizenship thereby recognising learning as of value to socio-economic growth'. The essential drivers of its development were 'funding and strategy' and, in the opinion of practitioners, neither of these factors have been adequately addressed. Learning brokerage is a process pioneered in voluntary and community sectors, yet there is a 'lack of recognition at government level downwards - after all this is an idea that has been successfully implemented for many years outside F/HE'. There was fear that the development of 'an army of professional brokers' might come to replace the 'organic process' developed by such existing activities. However, there was acknowledgement that for such processes to be sustained some form of formal structure was necessary. This tension between informality and sustainability was a prevalent one.

There were other inherent contradictions that will not be easy to resolve. For example, those involved at the frontline of learning brokerage 'often don't control the purse strings and so do not "own" the targets set by the funding bodies'. It was felt that funding for learning brokerage is currently skewed towards the FE/HE sector, particularly via Partnerships for Progression, despite the fact that many examples of good practice already exist in other contexts. It was argued that funders should:

> *Fund the provision in its own right, not as a service for one provider or another. The LSC in particular need to address this issue by not insisting that brokerage is tied to a major provider such as colleges, just because they fund them.*

Moreover, the emphasis on the workplace and on providing value to employers tends to be at odds with linking learning with 'pleasure' and transformation to entice marginalised learners. Funding was not systematically allocated, with the result that 'often several organisations are attempting to set up the same learning opportunities in the same area targeted at the same groups'.

Four key factors were seen as crucial to the development of learning brokerage nationally: recognition and dissemination of existing good practice, adequate and systematic funding for *all* sectors involved in learning brokerage, improved opportunities to work cross-sectorally (eg in 'regional and/or thematic agencies dedicated to supporting learning brokerage'), and, finally, consultation with potential users:

> *Commitment to the continuity and the regular provision of the service are vital, together with a shared determination to make the scheme work from all parties. Developing a good understanding of the potential users of the scheme is key and some consultation should be done with the recipients to identify not only what they want, but also when and how they want it. Without the support and the input of the recipients, no such scheme as this would be successful.*

The consultation revealed a high level of commitment and investment to making learning brokerage work, on the part of practitioners across the four domains of community, voluntary sector, workplace and educational institution. Learning brokerage is a potent tool in reconceptualising and revitalising learning, but without attention to these key structural factors by policy-makers and funders it will not and can not succeed.

4. The process of learning brokerage: a review

4.1 Introduction: the limits of the literature

It is worth stating from the outset that, in view of the topic's potential importance, the current literature related to learning brokerage appears somewhat inadequate. The existing literature is rather diffuse and repetitive, although this is perhaps inevitable given the multiple and fluid nature of the subject. The term learning broker does not generate a great deal of literature, and that which exists on the roles of individuals and organisations that motivate and inspire learners to take part in learning and help them to succeed (such as link workers, community development workers, change agents, lifelong learning advisers, signposters and learning champions) seems, for the most part, to lack a strong analytical edge. There is very little which focuses on and analyses brokerage as a process. Thursfield *et al.* (2004, Section 1) also argue strongly that learning brokerage is an underdeveloped concept that has been almost ignored, particularly in relation to workplace learning. If one compares the literature with the findings of the consultation with practitioners outlined in this report, the latter seems sharper and potentially more instructive. The following therefore builds critically on the literature and also draws on the consultation data to create an overview and analysis of existing knowledge on the subject of learning brokerage.

4.1.1 Developing a brokerage framework

The literature review builds on the work of Taylor and Cameron (2002) in further developing the notion of brokerage as a process rather than simply a job role. Support for this concept can be found in one of the few examples from the international literature that focuses specifically on brokerage. The report on a Socrates Adult Education project (Go-Between at www.kunly.soderhamn.se/gobetween.html) investigated the ability of career counselling organisations in Sweden, Belgium and the UK to act as brokers between individuals and learning providers, concluding that in the UK elements of a brokerage process could be identified and strengthened within adult education. The concept of the individual role of the broker was problematic on a number of counts: such a role would be broad with individuals taking responsibility for a range of tasks requiring high levels of different skills and competencies. Similarly, individuals would need to hold a potentially unrealistic breadth and depth of information. The framework has thus been developed to chart the key stages of learning brokerage, stages which will involve multiple networks. It should be emphasised that progression between stages is by no means seamless or uncontested and the process is not linear but cyclical and iterative. Moreover, although all stages are vital to the full effectiveness of learning brokerage, it is highly unlikely that one person will engage with every one. Each stage contributes to effective practice; however, context is all important, and consequently activities may vary within different contexts. The six stages identified are:

- understanding the current situation
- gaining entry and building trust
- making learning meaningful
- identifying the right learning opportunity
- promoting learning success
- addressing organisational issues.

The review thus emphasises a process account of brokerage, but incorporates within it the value of personal and informal relationships. Table 1 lists the stages identified, together with examples of key activities involved. These are discussed in greater detail below.

Table 1 Learning brokerage process stages and examples of key activities

Stage	Key activities
Understanding the current situation	■ Research – mapping the local area ■ Careful targeting ■ Consultation with potential learners ■ Collaboration at the design and planning stage
Gaining entry and building trust	■ Ongoing consultation – variety of approaches ■ Negotiation with gatekeepers ■ Exploring and establishing informal links ■ Establishing relationships with formal brokers
Making learning meaningful	■ Engaging with potential learners to develop informed understanding ■ Developing awareness of the context of people's lives to link learning opportunities ■ Developing awareness of the barriers to learning that acknowledge structural factors ■ Strategic approaches – importance of informal learning ■ Tactical approaches – starting from where people are at
Identifying the right learning opportunity	■ Formal pathways (eg mapped progression pathways) – effective signposting that takes into account the local context ■ Developing an informal approach based on past experience of learner which fulfils their goals ■ Providing 'hot' knowledge ■ Providing opportunities for further progression ■ Importance of providing learner support in transition and progression ■ Working with learning providers to ensure support

Promoting learning success	■ Preparing the learner
	■ Clear information on potential costs
	■ Working with learners to explore what they want from learning
	■ Negotiation with learning providers – developing appropriate pedagogy and curricula/developing understanding of and meeting the needs of learners/sensitivity to cost restraints of certain learners
	■ Building social networks of learners
	■ Facilitating progression both horizontally and vertically
Addressing organisational issues	■ Support for brokerage staff
	■ Community workers – awareness of the tensions and exclusions within communities
	■ Work-based brokers – employer control and lack of capacity
	■ Training
	■ Opportunities to share experience and network
	■ Support in setting boundaries
	■ Recognition of the contribution of learning brokerage
	■ Networks and partnerships – collaboration is essential
	■ Funding issues

4.1.2 The participants in learning brokerage

Consultation with practitioners revealed that there is no such thing as a generic learning broker and this can also be inferred from the literature. Taylor and Cameron (2002) identify two different types of broker, public organisations, such as Connexions or information advice and guidance services, and private individuals, such as neighbours or peers. They include within the latter group examples where brokerage is incidental to the job, such as a health visitor or librarian. Thursfield *et al.* (2004, Section 3) delineate four 'ideal types' of brokerage in the workplace: the learning adviser, the management coordinator, independent guidance and training intermediary. The following matrix (IAS 2003) is an attempt to map how learning brokerage can occur flexibly in many contexts. This sets a frame for the ongoing discussion.

Strong focus on learning

● Animateur model	Connexions ●
	Home-Start ●
● Football coach ● Neighbour	Librarian ● Health visitor ●

Weak focus on learning

Informal structure   Formal structure
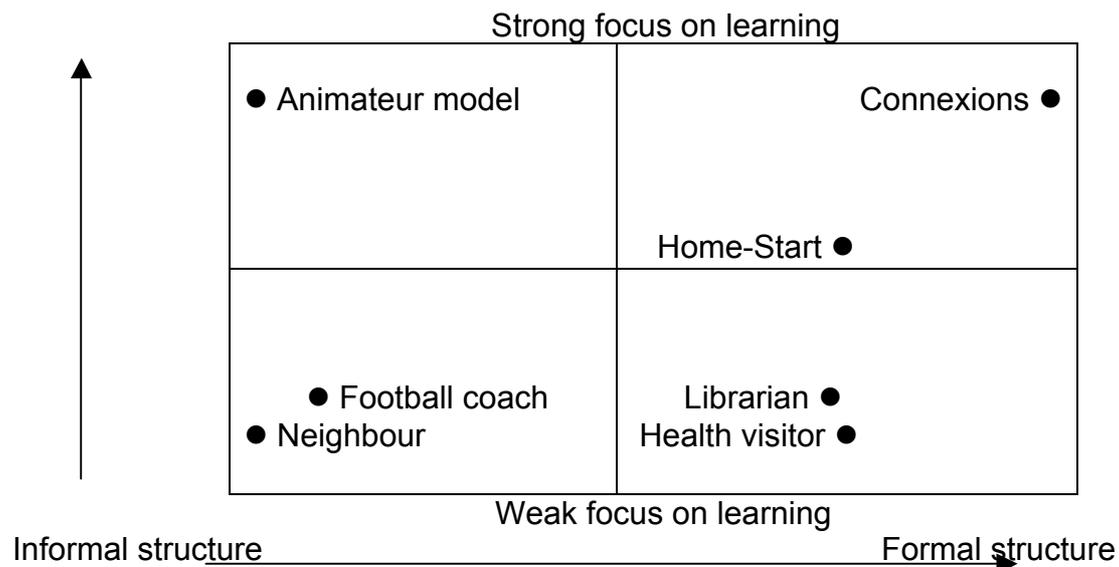
4.2 Understanding the current situation

The literature concurs with the findings of the practitioner consultation in emphasising the importance of understanding both 'learners' worlds' and 'the bigger picture'. For effective learning brokerage to take place, essential groundwork must be undertaken to establish a coherent picture of who is learning, what they are learning, who is providing learning opportunities to them and what significant gaps exist. If such groundwork is not done then duplication of effort, coupled with glaring holes in provision, is inevitable.

4.2.1 Research

A potential starting point for learning brokerage is the mapping of the geographical area and the participation of learners within it. Jude (2003) notes that information can be drawn from a variety of sources: national and local research, institutional data, discussions with existing learners and professionals, community professionals and activists, and local knowledge. The important role that primary research plays in this process has been highlighted in an evaluation of HEFCE-funded widening participation partnerships (Thomas *et al.* 2001). The benefits of research included establishing a focus for the partnership and avoiding wasting time, money and effort on inappropriate initiatives. In cases where research had not been conducted or utilised, problems were encountered and partners sometimes proceeded on ill-founded assumptions about local needs. Quinn (2004a) emphasises the need to think carefully and creatively about such research, using it to open up new learning possibilities.

4.2.2 Targeting

The importance of careful targeting at those most in need, right from the initial stages of the brokerage process, has been confirmed by much work in the field of widening participation (CVCP 1998; Thomas 2001; Universities UK 2001; Woodrow 2001). The literature on learning brokerage tends to use the phrase 'hard to reach groups' (eg Duffen and Merton 2001). There is no consensus on who these groups might be but they generally include economically disadvantaged communities, older people, ex-offenders, minority ethnic and linguistic communities and those with disabilities or

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learning difficulties (Callaghan *et al.* 2001). The phrase 'hard to reach' almost implies that such groups are hiding from learning providers; indeed, Duffen and Merton (2001: p3) even use the term 'elusive' to categorise them. This constructs their learning marginalisation as a problem owned by the groups themselves, rather than a consequence of social exclusion. Much of the literature tends to neglect the ways in which certain groups are structurally marginalised by racism, poverty or class: essentially pushed out rather than just hard to get to. Effective targeting has to take these fundamental inequalities seriously. Consultation with practitioners also emphasised the importance of not making assumptions about such target groups, in terms of their positioning as learners. For example, work with ex-offenders often proceeds on the basis that they are in need of basic skills and this can prove both alienating and disempowering. Targeting should not mean stereotyping.

Lack of targeting and the adoption of what might be called 'catch-all' approaches ignores the historical tendency for already privileged groups to benefit from opportunities not intended for them (see Thomas *et al.* 1999). For example, Kennedy (1998) has argued that while policies to widen participation have achieved some success, this has frequently provided additional opportunities for those who have already achieved educationally: 'All the evidence suggests that it is those who are already well qualified who go on to earn more and to demand and get more learning: many of those who fail the first time round never make up the lost ground, educationally or economically' (p167). Consequently, as Thomas and Slack (2002) insist 'care is needed to ensure that initiatives do not inadvertently capture second helpings rather than second chance lifelong learners', thereby further benefiting the former at the expense of the latter. Research into effective student support services (Rickinson 1998; Harris 2001) has also found that those who are most in need of support are actually the least likely to seek it out. Wherever possible, target groups need to be broken down into small and clearly defined categories and not simply treated as homogeneous groups (McGivney 2000).

The Kerry Travellers' Development Project
Travellers in Ireland are identified as a distinct ethnic group; they have very poor rates of completion of compulsory education, and very low levels of participation in further education and training. This project works with travellers in a number of ways to improve participation in learning, including the provision of learning opportunities, learning support, role models, work placements, a network of educational and training organisations, and links with accreditation boards.
Gornall (2001)

Big Futures
A compulsory 2-year programme for *Big Issue in the North* vendors which helps them identify and tackle their own personal problems and move into a job, or education/training course of their choice. Vendors have a monthly supervision meeting with a vendor support worker who challenges and motivates them to move on in their lives. All vendors complete three 'Learn to…' courses as part of Big Futures and these courses are accredited with the Open College Network (OCN).

Museum Fever!
Salford Museum and Art Gallery and the North West Museum Service wanted to explore how they could get young people actively involved with the local museum. They did this by working closely with staff and residents aged 16–25 from the Salford Foyer. The young people themselves decided what they wanted to do. This included designing a website and exhibition. One of the many achievements of the project has been to re-engage several of the young people back in to learning, pursuing NVQs and further voluntary work with other museums and galleries in the region.
CLMG (2002)

4.2.3 Consultation

Consultation is a vital element in learning brokerage and learners and potential learners should be involved at the design and planning stage, for example by using focus groups to establish parameters and priorities. Jude (2003) sees those affected by the issues as the most effective 'problem-solvers' since they have greater investment in finding workable solutions. She lists the following as good practice in consultation.

- Choose environments to work in that show that you value the participants and their contributions.
- Ensure the food is good and a crèche is available.
- Take photographs and video the event so others can share in it.
- Ensure that participants are welcomed, valued, heard and are clear about how their contributions will be used.
- People will produce practical and intelligent solutions to complex issues if they are given opportunities to engage seriously with them. Always treat adults as the knowledgeable and intelligent people they are – especially where their experience is concerned.
- Engage – listen, open up, challenge, encourage expression of feeling – share yours. Be willing to engage with complex and difficult issues. This is how trust develops.

The literature tends to paint a rather rosy picture of consultation which somewhat neglects power differentials between participants. The reality is likely to be far more messy and contentious than the literature suggests. Nevertheless it helps to set a frame for the involvement of learners in consultation.

In understanding the current situation, learning providers need to work together (see also Section 4.7). The Kennedy report (1997) posits knowledge of designated localities as a precondition of widening participation and argues that this can be obtained most effectively via collaboration among learning providers. Evaluation work (eg NIACE 2002) indicates that more use should be made of information already in the system, such as information gathered by partners, information, advice and guidance, and learning ambassadors or champions. Nevertheless, consulting in partnership is not always easy. Existing examples, such as the 'Voice of the Learner' activity developed by learning partnership coordinators in the West Midlands (NIACE 2002), reveal conflicts around response issues and flexibility, resources and time, commitment and the effective use of feedback, the effectiveness of different methods, and the lack of infrastructure and local knowledge.

Learning providers have to develop ways they can hear, interpret and act upon the voice of the learner. The establishment of 'learning consultative fora' is one way in which learning providers can collaborate more effectively to develop learning brokerage. The following guidelines for good practice have been developed (York Consulting 2000).

	Key questions
1. Purpose	Why do you want to consult/involve the learner? Who do you want to consult/involve? What do you expect to happen/change as a result?
2. Mapping	Which organisations/partnerships are already consulting? Why and how are they consulting? How effective is it? Are there gaps (duplication) in relation to key target groups?
3. Approach	How can you link with/build on existing activity? In what ways can you consult/involve?
4. Encouraging participation	What's in it for them? Why should they take part? How do you encourage ownership? Are you consulting a representative group? How do you involve the non-learners? How do you interpret and implement change? How do they know the impact, that things have changed?
5. Support and resources	What resources do you need to support your overall strategy? What skills and resources are needed for working with the target group?
6. Monitor and review	What are the process issues? What's the impact/effectiveness?

Learning providers should not only work with each other, but with other organisations that might already be consulting: councils; schools, colleges, training providers; existing partnerships; voluntary and community organisations and parish councils; and discretionary funded projects/initiatives. The use of intermediaries (eg youth workers or community groups) may be more appropriate for reaching certain groups and the use of peers/other learners has proved valuable.

Islington Citizens' Conference
In Islington, 125 people were invited to attend a conference to help draw up the Adult Learning Plan. The day was organised to draw upon what motivated people from disadvantaged communities to learn and succeed against all the odds and what prevented them. People were paid for their expertise (£50 per day) and told that their recommendations would be implemented. One recommendation was the need for a mentoring service. With the active involvement of local people, the Handholders' Project was subsequently set up.
Jude (2003)

Real Potential (High Trees Community Development Trust)
This project aims to map the learning needs of local residents and help them find and fulfil their real potential. The project team are visiting families and individuals to talk to them about what they would like to learn, how they prefer to learn and where. To date, the team have undertaken a pilot project contacting black and ethnic minority communities. Findings reveal 'everyone has something they want to learn'.
Adult and Community Learning Fund Project

Survey of Learning Aspirations of Older People in Rural Dorset
The aim of the project is to find out what older people need and wish regarding learning. A small team of older people (particularly non-learners) are being recruited to lead the project. Work will then be conducted with learning providers to consider the findings of the research.
Adult and Community Learning Fund Project

The Go-Between Project
This involves collaboration between Sweden, Belgium and the UK, to explore the ability of career counselling organisations to act as brokers between clients and the suppliers of adult education. The project aims to enable the organisations to gather the demands of their clients, give them structure and then influence providers to supply relevant programmes. Obstacles to brokerage were defined as:
- money – providers were unable to meet narrow needs because of the costs involved
- structural – the rigid structure of the educational systems involved and the lack of coordination between different forms of guidance
- rules – those involved in getting changes or new courses recognised
- attitudes and traditions – clients are used to a system where they take what is on offer rather than demanding new courses; providers had little tradition of adapting, and when they did adapt they were more likely to take the demands of the labour market into account than those of the students.

This latter point was explored in Sweden where it was found that clients had a lack of experience in describing their 'educational wishes'; indeed, many clients initially preferred to see a catalogue of courses. The work of the counsellor in ascertaining need in such situations has been vital.
www.kunly.soderhamn.se/gobetween.html

4.3 Gaining entry and building trust

Having established via research, existing information and initial consultation the patterns of learning which already exist and the unfilled needs of priority target groups, brokerage must find a way to gain access to the target group and build relationships of trust. Although this process will vary in different contexts it remains crucial in all domains, including the workplace.

4.3.1 Ongoing consultation

Consultation with practitioners emphasised the central importance of mutuality and trust within the brokerage relationship. This will involve an ongoing iterative process of consultation to develop appropriate learning opportunities. Jude (2003) believes that a range of consultation approaches from which communities can choose encourages communities to adopt approaches that match their role, size and character. A well-planned and evaluated pilot of new consultation approaches can be the catalyst for more wide-reaching change. Jude emphasises that community-led consultation implies creativity, risk-taking and resourcefulness and involves negotiating the relationship between control and risk, interference and accountability, widening participation and quality. She stresses that an important aspect of the

consultation process is recognising constraints and being open about them. It is far better to be clear about the limits of what can be achieved at the beginning of the consultative process than to raise false expectations. From the outset, brokers need to be clear with people about how they propose to use learners' suggestions and the extent to which they are able to act upon such recommendations suggestions. In addition, brokers should update learners regularly about any progress made. The practitioner consultation conducted as part of this research also highlighted the dangers of making promises that cannot be kept, but it emphasised that this is a structural issue where the person at the frontline of brokerage may have little control. Promises can be made in good faith only to have 'the rug pulled' by funders.

4.3.2 Gatekeepers

Those involved in brokerage will probably need to negotiate with 'gatekeepers' including community and religious leaders, headteachers, health visitors, employers and probation officers (McGivney 2000). McGivney asserts that approaching gatekeepers needs to be done sensitively and responsively to win 'hearts and minds' (p6). This can often prove challenging but is imperative if initiatives are to succeed. The challenges for those involved in brokerage can be practical: for example high staff turnover and time and work pressures among gatekeepers. 'Dealing with these requires patience and persistence: repeated follow-up communications, preparatory meetings with as many relevant people as possible and frequent dissemination of information on the current stage of the project to all of them' (McGivney 2000: p6). Problems may also be more deep rooted and involve changes in organisational culture or individual mindsets regarding the learning needs of the target group. Brokers need 'to enter into an early dialogue with gatekeepers about the nature and purposes of educational activities and their proposed and potential outcomes' (McGivney 2000: p6).

Taylor and Cameron (2002: p23) discuss how the workplace 'represents a huge, under-exploited opportunity to bring more people into learning, particularly the less skilled'. In a workplace setting employers are the gatekeepers who can make or break the brokerage process. Good practice guidelines from the Basic Skills Agency brokerage programme on engaging employers (Cutter 2002) indicated the importance of one-to-one contact with follow-up, 'gentle persistence' in generating awareness, demonstrating need, and revisiting issues and the options for developing delivery. However, employers may be conscious of their own barriers. They may be worried about staff shortages and the costs of releasing workers for education and fear that learning opportunities will create demands for higher wages and give employees the skills to seek work elsewhere (Howard 2001). Brokers/providers need to offer them some form of support in exchange for their cooperation. Although some employees engage in learning as an escape route from their current job (see Thursfield *et al.* 2004, Section 4.2) there is also evidence, which needs to be highlighted by the broker, that investment in learning can help to retain staff. For example, an evaluation of employee development schemes (Lee 2002) has highlighted a range of benefits to employers including increased motivation and confidence of employees combined with increased skills. Moreover, the entire workforce was found to

benefit, not only those taking part in learning activities. A more complex situation can arise when it is the person in the brokerage role who acts as a gatekeeper. Thursfield *et al.* (2004, Section 4.2) analyse an example where a learning broker withheld information on available learning opportunities from employees and only promoted an IT training agenda that directly benefited the company. This ultimately made employment relations within the company worse.

> Work has been done by the **Oxfordshire Strategic Partnership** with a range of gatekeepers including managers of care homes to reach low qualified care workers and work with the local probation service to assess the literacy and numeracy levels of offenders.
> McGivney (2000: p6)

4.3.3 Informal brokers: ties and peers
The literature also demonstrates how links can be made, not through those in authority, but through those who have ties with the target group. For example women and ethnic minority adults have been effectively reached through their children or other young people in their community and by networking with local schoolteachers. Current learners are potentially the most effective advocates of the learning experience. As Jude (2003) argues, 'involving people who've been there, done it and know what it's like can be the most inspirational of all'. Existing learners with similar backgrounds can highlight problems to both potential learners and learning providers, as well as offer advice and guidance in overcoming these barriers:

> *People from disadvantaged communities share huge challenges in common yet rarely have opportunities to share experiences. Networks can help galvanise collective knowledge and understandings, strategies and solutions. They can also create strong and lasting relationships.*
>
> (Jude 2003)

Britton's (2002) study of the Bedfordshire and Luton Learning Partnership highlighted the need to develop 'learning champions' or 'peers' in communities to help engage potential learners and support them into learning. The LSC guide (2002) to engaging in peer consultation with young people delineates the benefits to both providers and learners. It suggests that providers gain a better understanding of learners and learning, and this results in subsequent improvements in rates of participation, retention and achievement and in the quality of provision. Furthermore, priorities can be developed according to need. Learners benefit from the opportunity to influence and reap the reward of the outcomes, improved motivation and achievement of learning goals, and acquiring and developing transferable skills with other learners. They also feel recognised and valued for making a difference. The guide suggests that methods used to engage and consult with young people should be flexibly applied according to the target group. It concludes that young people (peer consultants) can be effective intermediaries but must be treated with honesty, given the necessary time to make consultation meaningful and recognised and rewarded for taking part.

Cut, Advice and Blow-Dry
This initiative, run by Rycotewood College, used local hairdressers to encourage women to consider returning to learning, pointing them to guidance and learning opportunities in the area.
Hillage and Aston (2001)

Peer Partners Prison Project
The Basic Skills Agency, in collaboration with the prison education service, has sponsored a variety of projects which aim to recruit and train inmates as volunteer tutors.
www.basic-skills.co.uk

Examples of the work of community learning champions
A community champion in the Stoke-on-Trent area received funding to renovate an empty council-owned shop into a drop-in and IT training centre for local residents. Although work is still in progress, residents are already benefiting from being able to access training courses within their own community, with 50 people registered on the training database. Meetings have been set up with Learndirect and a local college has donated £20,000 worth of computer equipment to enable the project to act as a college outpost.

A community champion received funding to train four local members of her village to manage their primary school's IT resources. Having trained people on hand to cover open access periods has meant more people can now use the school's IT facilities.

4.3.4 Formal brokers: link workers
Link workers of different types, including learning representatives in the workplace, can also play a valuable role in developing relationships of trust from which learning opportunities can build, and can help to facilitate the peer networks discussed above. Employing members of communities as link workers can foster this process. Evaluation of the Staffordshire Strategic Partnership (Thomas *et al.* 1999) highlighted the importance of link workers having a visible, accessible base in the community, one from which such networks can be supported and developed. Moreover:

> *Community development and outreach workers, animateurs and cultural workers, who take their lead from local people, who offer their skills in response to the issues identified by local people, who work in solidarity with local people and who are happy to hand over power and control to local people, can become serious allies in supporting community activity.*
>
> (Thompson 2001: p41)

The Coalfields Regeneration Trust Project in Merthyr Tydfil
The WEA, working in partnership with the Coalfields Regeneration Trust, started a pilot project in March 2001. The project involved training 'lifelong learning advisers' who would be out there in the community as mentors and information providers for those who needed it. Training courses were aimed at those who had benefited themselves from returning to education, or who had seen first-hand what a difference attending a course and receiving credit can make to an individual.
www.waleslearninglink.org.uk/cfhome.htm

Greenwich Community Learning Champions
These are volunteers who recruit adults within their communities into learning. The scheme has recently been extended to three schools and the prison and ex-offenders communities. Champions are working with parents/carers to promote adult education; long-term prisoners are being trained to recruit short-term prisoners into prison education; and ex-offenders are being trained to work with and support other ex-offenders.
www.niace.org.uk/funds/ACLF/Projects/Default.htm

Link Up Project
A pilot project, working in 20 deprived locations across England, to promote literacy, language and numeracy volunteering. Link Up is managed by the Basic Skills Agency along with seven project partners representing the voluntary and educational sectors. Link Up is funded by the Adult Basic Skills Strategy Unit (DfES) and the Active Community Unit (Home Office). The programme will train and support 6000 Link Up supporters in a range of roles and contexts including mentors, frontline workers, learner support and community workers. The programme is being run until March 2004. It is part of the government's Skills for Life strategy.
www.linkup-volunteers.org.uk

Community Animateur Action Research Project, Cork City
A community animateur is a community development worker who focuses on education as a central component. S/he supports, encourages and enlivens people in some venture in a community setting. The 'animateur' is the 'enthusiast and driving force' in the context of community-initiated adult education. The project specifically targets economically and socially excluded or marginalised communities and works with a range of formal education providers and informal groups and networks.
Contact: The Centre for Adult Continuing Education, UCC, Cork, Ireland

4.4 Making learning meaningful

In order to participate in learning, people first have to be able to perceive themselves as learners. The practitioner consultation stressed that making learning a meaningful possibility was the crucial missing part of the brokerage jigsaw. The most recent NIACE survey on adult participation in learning (Aldridge and Tuckett 2002) revealed that:

■ one in four people still believes that learning is not for the likes of them
■ the main factors preventing participation are a lack of interest in learning (25%) and work or other time pressures.

It is futile to ignore this lack of interest, or simply ascribe it to the deficiency of the unenlightened. It tells us that there is something fundamentally lacking in the learning being offered. Jane Thompson is probably the most tough-minded and visionary of the writers on this subject:

Lifelong learning will be most purposeful when it is related to the ordinary concerns of everyday life, and it is not seen as something that other people do, or which is irrelevant. It will be most engaging when it captures the imagination, encourages emotional involvement and provides for the satisfaction of unfulfilled desires. It will be most sustained when it gets results in the form of palpable personal, social and political changes.

(2001: p38)

In order for learning to be meaningful it also has to be possible. Thursfield *et al*. (2004, Section 4.2) illustrate how practical factors such as shift patterns simply exclude some workers from work-related learning opportunities.

4.4.1 Learning and identity

Ideally, learning brokerage should provide the pivot for this change in both learner perception and provider production, but it has to engage with potential learners at an intimate level since 'non-learner' is as potent an identity as 'learner'. '*Not* thinking of oneself as a learner may be a core part of some adults' social identities' (Field *et al.* 2001: p8) and the process of transformation from non-learner to potential learner is thus almost counter-intuitive. Hutchings (2003), reflecting on entry into higher education, argues that for the majority there is 'no moment of decision'. For many working class people higher education has simply never been on the agenda. Decisions about higher education are not merely economic ones but also concerned with emotion and identity, and the same is true of other learning opportunities. Jude (2003) believes 'developing relationships that enable people to express and navigate their feelings about learning is as important as the achievement of their expressed learning goals'. McGivney (2000: p7) argues for 'cultural sensitivity' building on 'an informed understanding of group characteristics, circumstances, values and priorities'.

4.4.2 Social exclusion
Disadvantaged urban areas

Such 'group characteristics', however, must be understood as socially produced. Research into the attitudes to adult education in disadvantaged areas (Bowman *et al.* 2000) reveals that 'education is not an isolated experience … the decisions to be involved in education and/or training as an adult are made in the context of people's past and current experiences'. This study found that many people living in such areas are sceptical about both the role of education in helping them gain employment and the value of certain qualifications. It also highlights the embedded conditions which make learning difficult, if not impossible, within disadvantaged areas. For example, family life may be extremely precarious because of a range of economic and social pressures, the informal economy draws people away from more legitimate opportunities, and a fear of crime means people do not want to leave their homes at regular patterned times.

Rural areas

Research on rural groups (Lynn 2002b; Powley 2002) highlights a fear of accreditation and a desire to continue studying within the rural community. Lynn argues that factors which are more significant in rural areas than urban areas are low pay, inadequate pensions, lower levels of benefit take-up, poverty in self-employment and fear of stigma in small communities. Lack of transport, childcare and affordable housing also contribute to social exclusion.

Taylor and Cameron (2002) conclude that, for those who are socially excluded, poverty, geography and individual life histories combine to influence decisions to get involved in learning or to drop-out and not return. 'Not taking

part in formal learning can represent a very rational approach, where the individual has weighed up the costs and likely benefits and judged the outcomes unfavourable' (Taylor and Cameron 2002: p15). Thursfield *et al.* (2004, Section 4.1) argue that employers often do not recognise that their employees have valid practical reasons not to participate in some learning opportunities they are offered, and so persist in regarding employee decisions as failure or indifference to learning. Taylor and Cameron put forward the following challenges for policy-makers and practitioners: link learning with goals that matter in people's lives, strengthen communities as locations for learning and supporters of learning, provide support for networks in and between communities to demand learning and help embed a learning culture. Thursfield *et al.* (2004, Section 5.1) discuss how brokerage can foster learning cultures in the workplace by making learning an integral part of shared experience and social cohesiveness.

Learning brokerage is a means of dealing in a realistic way with such constraints of social exclusion, as it involves working very gradually at an incremental level in a context-specific and reflexive way.

'Get on Board' and 'The Learning Bus'
Read On – Write Away! is a literacy initiative set up in Derbyshire in 1997 which has resulted in similar schemes in north Nottinghamshire and north Derbyshire. It focuses on the idea of 'joined up thinking', forming effective partnerships with other organisations in order to develop innovative ways to engage adults and children. Evaluation of the initiative in 2000 highlighted that small, isolated and rural communities were still not being reached. To combat this the initiative developed two learning buses with crèche and ICT facilities. Both buses have a dedicated driver who is fully involved with activity on the bus. About 50% of the use of the buses is for the Read On – Write Away activity, while voluntary and community organisations and other providers account for the other 50% of the use.
Basic Skills Agency (2002)

LearningChoices
Whether you want to learn for fun or serious reasons, there is no greater challenge than living in the country and trying to get access to all the activities, equipment and help you'll find in the city.
LearningChoices is an organisation within the Upper Coquet and Wansbeck valleys which aims to help overcome these problems by bringing learning activities to where people live. It also helps new and existing groups to develop their activities.
www.learningchoices.supanet.com/

4.4.3 Barriers to learning
Barriers to learning have been discussed at length in a literature review on attracting new learners (Hillage and Aston 2001). These barriers are presented as attitudinal (lack of confidence and motivation, combined with negative attitudes to education and training and peer group culture), physical and material (such as finance, time, childcare, lack of information and geography) and structural (such as lack of local learning opportunities).

Hillage and Aston detail over a hundred initiatives (UK and international) aimed at stimulating demand for learning. These are categorised into three broad types:

- stimulating mass demand, such as adult learners' weeks
- stimulating demand for learning among targeted groups of individuals and communities
- stimulating demand among employers for work-related learning.

They conclude (p60) that:

> …*most of the initiatives appear to be focused on making it easier for people who would like to learn but find it difficult for one reason or another – deterred learners – rather than the unmotivated, those who see no advantage in learning – the non-learners.*

Barriers to learning have been discussed by Callaghan *et al.* (2001), who also distinguish between attitudes to learning and practical obstacles.

Many studies appear to adopt a learner deficit model, a model which serves to blame the individual, group or community for their own non-participation in formal learning. Such a model positions the individual as in need of change, and consequently deflects attention from structural factors such as the exclusive nature of institutions and implicitly shrouds the need for systemic change. Malcolm Tight (1998) referred to it as 'victim blaming' in that powerless individuals or members of a community are blamed for their 'failure' to achieve. Thompson (2001) provides a trenchant and welcome critique of such individualised accounts. She argues that the lifelong learning debates currently revolve around the notion of individuals, thus underestimating the impact of structural constraints and overlooking the huge disparity in resources available to different social groups. The greatest challenge for policy-makers and practitioners, she argues, is to demonstrate the relevance and commitment of lifelong learning to tackling 'the urgent problems and real concerns of people living in the kinds of circumstances in poor and run-down neighbourhoods that defeat the most courageous of us' (p11). It seems that this critique is having some effect, as a literature review on learner motivation (LSDA 2003a) starts to develop a more sophisticated analysis of barriers where personal factors are seen in conjunction with economic, social and class factors, policy related factors and institutional factors. However, given the complexity of the picture it is surely time to jettison the concept of 'motivation', which still makes non-participation in learning appear as a lack of moral fibre and determination.

4.4.4 Strategic approaches

Thompson (2001) provides a strategic approach to making learning meaningful. She argues that conventional adult learning may seem out of touch and people can learn important lessons about organising themselves, building their capacity, collaborating with others and resolving conflicts from experience and through informal learning, with learning providers acting as a resource to local people rather than a supplier of marketable commodities. She discusses the benefits of ICT in connecting different communities and supporting community learning opportunities as well as generating training

and employment. Most significant of all, perhaps, she proposes bringing informal learning into the mainstream of provision. Much of the literature is rather starry-eyed about community learning, but Thompson makes the vital point that bottom-up initiatives are always in danger of incorporation by more powerful institutions, agencies and interests. Ultimately she throws down the gauntlet to learning providers and policy-makers:

> *They will need to re-learn and make into a new kind of reality the old adult education ideal of starting from where people are, in ways that are not devoid of context, and which pay tribute to the diversity and complexity of people's lives. They will need to come off their platforms, out of their offices and from behind their procedures into creative spaces in which dialogue and connection can be established and sustained. They must come prepared to listen and respond; to learn and to try to understand; to get stuck in and to stay.*

(Thompson 2001: p37)

The **Communities in Crisis** project in Greater Manchester provides adults who are active in their communities with training, support and resources to help them resolve local problems and issues that they have identified themselves. Participants tend to be low paid or unemployed, with poor early schooling and little experience of post-16 education.
McGivney (1999)

4.4.5 Brokerage tactics
The literature also has some lessons about tactical approaches brokers should employ to engage interest in learning. These are outlined below.

- *Appropriate language*. The importance of using the right language is underlined. Implications of deficit or lack should be avoided (Jude 2003) and terminology such as 'activities' rather than 'education' or 'learning' should be deployed McGivney (2000). Words like 'assessment' and 'exams' are best avoided altogether. Thursfield *et al.* (2004, Section 4.1) confirm that the language used by the proponents of workplace learning can itself be a barrier.

- *Starting from the everyday*. Both Howard (2001) and Thomas (2001) highlight the importance of working from what learners know and where they are. Thomas quotes work by Spedding and Gregson (2000), who emphasise the importance of a 'missing curriculum' that recognises and values the everyday life experiences, needs and interests of local people and of making learners 'comfortable' using local venues, and involving friends and allies.

- *Starting from communities*. Some of the most successful efforts have focused on community and family learning. Many people may be reluctant to be out of step with their communities by going against cultural norms. It is also easier to embark on something new and potentially intimidating as a group (McGivney 2000). 'The motivation to learn is more likely to be created and sustained if the will to succeed is shared by families and communities' (Howard 2001: p6). Thursfield *et al.* (2004, Section 5.1) demonstrate how learning functions best in the workplace as a communal activity.

WEA projects

Oakridge Project
The project aims to promote lifelong learning by identifying needs, liaising with other organisations and agencies, supporting individual students and providing a programme of courses. The courses run are informal and offered in local places, and the project works closely with health visitors, community agencies, schools, local churches etc. Art and craft classes form the core of the programme.

Young Men and Music Project
This project uses young people's interest in contemporary dance music and its technology to hook disaffected young men aged 16–25 back into learning. A development team of ex-students has been formed. These individuals are paid and provide input into the course development, recruitment and delivery.

Building a Community Mosaic
A community arts project at Cutteslowe Community Centre was started as a way of structuring a communication skills course. The design and manufacture of the mosaic introduced students to teamworking and developed their communication skills. The design of the mosaic was their own and relevant.

WEA (2002)

- *Starting from interest groups*. Brokers can engage learners by working with interest groups such as faith communities, trade unions and voluntary groups (McNair 2003).
- *Starting from existing knowledge and skills*. Brokers can build learning capacity by recognising and accrediting prior learning.
- *Starting from people's habits and desires*. Taylor and Cameron (2002: p21) suggest that 'Learning that is integrated into other activities (ie wrapped or hidden) may be the all-important stimulus or first step'. For example, research is currently being undertaken to use the popularity of mobile phones, handheld computers and computer games to encourage young adults to take part in learning experiences (LSDA 2003b). McGivney (1999, 2000) has also stressed the importance of using non-educational activities as the first 'hook' and emphasising the short-term benefits. Accessible and congenial local provision is essential as many people are hesitant to leave their familial territory. This is supported by Callaghan *et al.* (2001), who argue that non-standard locations (eg museums, sound studios, health centres or pubs) can help to make adult learning attractive and accessible.

Inn Tuition/'A pint and a prospectus please'. Popular courses run in Leeds inner city pubs (eg 'ordering drinks abroad' and 'local history').
Hillage and Aston (2001)

Yorkshire Forward (the Regional Development Agency in Yorkshire) have an innovative project **'From Play Station to Work Station'** to develop the Level 4 IT skills required by employers, but not readily available in the labour market. There are many young men with excellent computer game skills which can be converted to meet the needs of employers. This project involves mapping PlayStation skills etc.

Fairbridge
One way of getting people back into learning is to pretend it's something else. Football, for example.
Fairbridge supports 14–25 year olds who are not in education, training or employment, and who are at risk of dropping out. Some have been excluded from school, been unemployed for a long time or been homeless – and some are involved in criminal activity. Fairbridge is currently running a football project to develop the basic skills of young people. The project involves a 20-week course which runs one day a week in Birmingham, Liverpool, Manchester, Middlesbrough and Newcastle. The morning is spent working on a magazine, and the afternoon involves football coaching, which provides the material which they write about in the magazine.
Adult and Community Learning Fund Project

■ *A negotiated curriculum*. Brokers should negotiate the content of the learning opportunity with learners or groups that represent their views. Content and delivery should be sufficiently flexible to cater for emerging interests and changing circumstances, and a response to identified interests (LSDA 2003a). Thursfield *et al.* (2004, Section 5.2) emphasise the importance of 'ownership', demonstrating that successful outcomes can occur where workplace learning offers individual choice to learners and the brokerage process facilitates openness and learner representation. Good communication between the employee and the broker is crucial to this process (Thursfield *et al.* 2004, Section 5.1).

Progression Pathways Project
Following consultation with the community, the project has offered a demand-led model where, in partnership with providers, a number of new modules and programmes have been written that respond to new learning interests which are relevant to those in the community. This has required considerable flexibility on the part of providers as the modules previously offered were often irrelevant or inappropriate for these individuals. The project challenged a number of institutional values and structures.
Noble and Lynn (2002)

■ *A supported engagement with learning*. Learning activities should be offered with a range of support services, including financial incentives (LSDA 2003a).

4.5 Identifying the right learning opportunity
For learning brokerage to be successful, potential learners must be made aware of appropriate and meaningful learning opportunities. The process is twofold and learning providers also need to develop provision which meets

needs and builds on existing skills and knowledge. There appear to be two different approaches within the literature to the question of identifying the right learning opportunity. One is more formal and structured around the notion of 'learning pathways'. Partnerships for Progression is such an example. Here learners are led by brokers along the road to existing learning opportunities. The other considers a more informal approach which builds on the accreditation of prior learning, developing learning provision from the perspective of the learner. Here the learner is helped to build the path themselves, out of the materials of their past experience, and this enables them to fulfil their own learning goals rather than those of other people.

4.5.1 'Hot' and 'cold' knowledge

What is the best way to communicate such knowledge across the gulf between learning providers and potential learners? Hutchings (2003) discusses the work of Ball and Vincent (1998) regarding 'hot' and 'cold' knowledge. Cold knowledge is provided by official sources that do not have a personal interest in the recipient of the information. It is often viewed with suspicion because the providers are perceived to be serving their own interests. Hot knowledge is 'grapevine' knowledge from friends, neighbours and relatives. It also comes from 'people like me' who are perceived as having no personal interest, and no axe to grind. Hutchings concludes that therefore information needs to be provided in a way that makes it 'hot' knowledge. Although learning providers may feel they do this already via the personal contact of mentors and high street 'shops', surely this knowledge is merely lukewarm. Brokerage, in the sense of imaginatively mediating such information must play a key role here.

4.5.2 Formal learning pathways

If formal learning pathways are the model in use then they have to be effectively signposted. Leathwood and Hutchings (2003) make the important point that different pathways, curricula and qualifications accrue differential value and benefits and part of the brokerage process must surely be to clarify these differences for potential learners. Work by the LSDA (2002) on learning pathways for adults in Oxfordshire, Milton Keynes and Buckinghamshire questioned the quality and clarity of some of the information given by providers to guidance workers acting as brokers. Such information was felt to be 'too general' and would have been more effective had it focused on local labour market information and how courses relate to jobs. Recommendations included the need for providers to prepare case studies showing destination patterns of 'real' adults and also the inclusion of progression data in course prospectuses. In some respects this approach would counter the scepticism towards qualifications as the routes into work, expressed in the Bowman *et al.* (2000) study. However, the strong emphasis on job-related information seems to posit an unhelpfully narrow definition of appropriate learning at odds with much literature on lifelong learning. Furthermore, an approach which simply tries to absorb the learner into the system is far too passive. Marginalised groups are less likely to take up existing learning opportunities than to engage in customised opportunities provided by organisations in response to identified interests and needs through a process of learning brokerage.

Prescriptions for Learning Project

This action research project is seeking to explore the impact of learning on individual health among adults in south Nottingham. The project involves having a 'learning adviser' based in surgeries in one Patient Care Group area. The learning adviser will:

■ offer advice and guidance about educational opportunities to patients and staff as appropriate

■ manage the 'prescriptions for learning' process and negotiate discounts with education providers

■ offer 'prescriptions for learning' and other encouragement to patients/service users which would encourage them to take part in learning locally

■ ensure that practices have information about learning opportunities.

It is hoped that the learning adviser will train other advisers so that the work can be rolled out further.

Regional Educational Guidance Service for Adults, Waterford, Ireland

A comprehensive, accessible guidance service for adults at risk of social exclusion in the south-east of Ireland (ESF funded).

People who have missed out on education the first time around need to acquire both information and skills, the actual currency that allows them to negotiate and ultimately participate fully in education. Guidance is a way of bridging this gap. Equality of opportunity is not enough to create a level playing field for everyone. Structures and support systems of guidance, childcare provision and flexible modes of provision must be in place to allow full and not differential participation rates for those who take a second chance at education (Harte and Jordan 1999: p43).

The service is free of charge and available in one central and three rural outreach locations, and has connections with the world of work and education providers, to help provide a bridge between different worlds.

Community Empowerment and Development, Sandwell Sikh Community and Youth Forum

The project targets the Sikh/Punjabi community, particularly women. Its objectives are to:

■ increase participation of the Asian community in New Deal, Modern Apprenticeships, NVQs etc

■ make clients aware of services and support available

■ bridge the gap between service provision and isolated community groups

■ provide access to information, advice and guidance to people who would not otherwise access services because of cultural, economic and social barriers.

Two dedicated guidance workers have been recruited from the local community, and are tasked with forging links to appropriate community groups and locations served by the target group. They negotiate with community and other organisations about providing outreach venues, but will also see clients in their homes if they prefer. They also advocate with providers on behalf of the group.

Adult Guidance Pilot Project

4.5.3 Informal developmental models

The more informal developmental model is championed by McGivney (1999). She sees motivation and educational progression not as generated by external stimuli, such as jobs, but as engendered by reflection on prior learning, especially learning that has taken place in non-educational environments and contexts. This also has the benefit of promoting understanding and building self-esteem. Community-based programmes can provide the vehicle for this process. Informal learning opportunities may in themselves be what people want; for example, research by Bowman *et al.* (2000) found that women who were accessing small supportive centres were not inclined to use more formal provision. This finding is echoed by Thursfield *et al.* (2004, Section 4.1), who found many employees were engaged in learning in pursuit of leisure activities but with no wish to formalise this or connect it in any way with the workplace. The evaluation of the Adult and Community Learning Fund (Field *et al.* 2001) underlines the importance of the following: direct person-to-person recruitment; the role of inspiration and example; building the curriculum on the basis of identified needs; flexible and adaptive teaching methods to combine serious learning with fun; the availability of accreditation and assessment; 'learning by stealth' as a natural extension of other activities; and building group and mutual peer group support.

Big Issue Foundation, London

Working with homeless people and vendors in London, the Big Issue Foundation delivered a short introduction to photography with basic skills work training. The course ran in two different formats:

- two training days per week, one day focusing on photography and the following day as a group tutorial where basic skills were covered
- a one-day training course delivering the photography and basic skills in conjunction – in this model the group explored how to follow a theme through images.

4.5.4 Progression into accredited learning

Outreach programmes can also provide important progression opportunities. All studies show that, however informal they are, outreach courses and other learning activities should not be isolated, one-off events and there should be some opportunity to progress further. Facilitating such progression into more formal and certified programmes requires particular arrangements and mechanisms in place. In particular, it requires staff encouragement, support and knowledge of other learning opportunities; collaboration and partnerships between sectors, institutions and organisations to create a range of opportunities; information and guidance services with good referral procedures; clear and well-developed progression routes with linkages between non-credit courses and accredited courses; articulation between outreach provision and mainstream programmes; OCN and Accreditation of Prior Experiential Learning (APEL) schemes; modularised courses; support mechanisms and learning support (McGivney 1999).

Callaghan *et al.*'s literature review (2001) confirms that one of the most important benefits of adult and community learning is that it provides a way back into more formal learning. However, the literature also sounds a cautionary note. Lynn (2002a: p21) argues that:

> *The desire to provide an effective learning experience is often incompatible with the structures and constraints of the learning provider. Unless institutional cultures and practices change in both FE and HE institutions, and outreach provision is viewed as an integral part of an institution's work, learners who do progress from outreach provision may withdraw or fail to achieve.*

Support for transition can be achieved through staff and student visits to develop relationships. For example, college staff can visit students in a community or work-based setting prior to progression, and groups of learners can visit other learning sites. Half-and-half programmes, where courses start in the community and the group moves together into a formal institution, can be a useful mechanism to promote progression to further, more formal, learning. Mentoring and ambassador schemes, which offer a role model, advice and guidance and general encouragement, can also be utilised. Progression routes are created and enabled by structures and infrastructures: for example by curriculum and accreditation strategies and by learning and learner support mechanisms. Informality has to work hand in hand with more formal change.

Your experience counts!
This is a 10-week evening course offered by Staffordshire University which is specifically designed for those who would normally be excluded from university. It aims to help individuals consider the ways in which their life experiences have equipped them for university study. Students produce a portfolio of 'evidence' which, on completion, is graded by the relevant department and a decision is made over whether the student can enrol onto a degree programme. All students receive feedback on their portfolio, and, where necessary, are given advice on alternative routes to take (eg HND, Access course).
Hammersley-Fletcher (2002)

4.6 Promoting learning success
Irrespective of the type of learning being undertaken, it is clear that for positive benefits to accrue to the learner they must be supported to achieve their own learning goals. Success therefore should not be narrowly defined, although funding regimes often reinforce concepts of success which include full attendance on the prescribed programme of study, achieving the target qualification and progressing to suitable employment or further learning. As is discussed elsewhere in this report, learning brokerage, particularly in community and voluntary settings and at the informal end, is less concerned with hard indicators of success, as the process is incremental and comparatively slow. Less easily measured conceptualisations of success, such as acquiring sufficient information or developing increased self-confidence through partial completion of a programme, are rarely measured, but are more consonant with more radical notions of lifelong learning. In order to support learning success, the learning brokerage process extends beyond entry into a learning situation, and includes working with learners and with learning providers.

4.6.1 Preparation

A knowledge of what to expect and the appropriate skills to cope are first steps towards success. For many students their only experience of education is their schooling, which may well be negative and contribute to the belief that they are 'non-learners' (Preece 1999). Learning brokerage can help overcome such fears by organising pre-entry taster sessions, visits to existing courses, or meetings with current or future students, which can all help to dispel the fear of the unknown. Many students are afraid that they will be unable to cope with learning, and thus information about the expected level of existing knowledge/skills needs to be shared with potential learners. If students do not feel that they have the appropriate knowledge or skills, the learning brokerage process can seek to develop these through pre-entry courses or one-to-one or small group preparatory sessions. Simply bringing learners together can act as sufficient reassurance that people like them will be learning together. Learning providers need to be encouraged to cooperate in pre-entry activities to reduce anxiety, and to offer appropriate pre-entry courses.

Coventry University: Advice and Guidance in the Community

Coventry University has developed an outreach approach to information, advice and guidance. It has provided an institutional guidance service, including opportunity stands and guidance sessions on 'what I might study next' within community-based courses, and taster and bridging courses have been offered in partnership with other providers. The institution has found that the most effective use of community networks lies in assisting others to provide sound educational guidance as part of their activities. Collaboration with guidance partners from a wide range of organisations has resulted in the production of interactive software packages to empower people to approach more formal support. These include the 'Make your experience count' package, where the key aim is to increase confidence, and the 'Learning by degree' package, which provides information about degree structures and services.
Williams (1999)

Milton Keynes College

The college introduced 'customer services advisers' who interview students and build relationships with prospective students and their families and act as a personal contact. Information is sent to students who have applied to the college, on a monthly basis, including details of study support and college services. The college also runs taster sessions, activity days and roadshows to enable students and their families to familiarise themselves with the college and to make friends.
Sadler (2002a)

4.6.2 Cost

Cost is a major barrier to continued participation. Direct costs, such as fees, are likely to be considered prior to enrolment (and thus will deter many students, McNair 2003). Additional costs accrue through travel, books, equipment and resources and childcare; entitlement to benefits may also impact on attendance. Learners need clear information about additional costs:

where the course is located, any additional travel expected, how often they will need to attend/meet up, the hours involved, what materials they will need to provide themselves, and any financial support available. Learning providers should seek to keep costs to a minimum, for example by delivering courses in the locality, during school hours perhaps and using cheap or free materials. They need to consider the provision of free or low-cost childcare. An innovative approach involves training parents as childcarers, and then through reciprocal arrangements parents can undertake further learning. Learning brokerage is pivotal in ensuring learners have sufficient and appropriate information about all the costs of learning, and challenging providers to be sensitive to the cost constraints of certain learners.

Bracknell and Wokingham College
Students aged 19+ are interviewed by both subject staff and the student services team. The latter concentrates on issues around managing finances (eg covering the impact on benefits, additional costs and any financial assistance available.)
Sadler (2002b)

Leeds Metropolitan University
The university, through funding from the ESF, is offering the following opportunities free of charge to individuals and organisations in the local area.
- Community Business Skills Project – aimed at promoting wider access to lifelong learning through supporting employees of small and medium-sized enterprises (SMEs), the unemployed, social entrepreneurs, ethnic minorities and those working for community businesses and voluntary organisations.
- Key Skills and Enterprise Project – aimed at improving the employability skills of unemployed adults or those working on a part-time basis.
- Skills for Rural Adaptability Project – will deliver fully funded, local, work-based, customised training in higher level skills to employees of SMEs in sectors vulnerable to change, including those in rural areas.
The courses can be run either at the workplace, or in the East Leeds Family Learning Centre.

4.6.3 Curriculum and pedagogy
As noted above, courses need to be designed to take into account the interests and experiences of the learners (Feetham 2000; Hargreave and Tudor 2000; Spedding and Gregson 2000). If learning does not relate to people's experiences, needs and interests, they are less likely to continue on learning programmes. The pedagogy also needs to take account of the starting point of students. Spedding and Gregson (2000) conclude that more work is 'urgently needed' to develop and apply appropriate pedagogies and curricula to engage non-traditional student groups. Similarly, Noble and Lynn (2002) argue that course and curriculum design should utilise learning strategies which stress the relevance of the subject to the learner's personal experience. For employees also the language of workplace learning should better reflect the significance of informal learning (Thursfield *et al.* 2004, Section 4.1). McGivney (1999) and Noble and Lynn (2002) note the importance of designing curricula that ensure early successes, and boosts confidence. These successes can be built upon by active celebration of successes throughout the programme. Curriculum and pedagogy are primarily the

responsibility of learning providers, but through learning brokerage negotiation can ensure that a specific learning opportunity meets the needs of the particular learner group. Thomas (2001) describes 'a tailor-made programme of courses' in which participants agree when and where the course meets, and contribute to determining the course contents. Similarly, Blehein and O'Grady (2000: piii) describe a situation where 'Assignment topics were negotiated between tutors and participants to provide the opportunity to relate theory to practice, to reflect on practice and, in turn, to generate new theory'.

University of Leeds: Certificate in Islamic Studies
The University of Leeds, in response to the local Asian community, has developed a package of courses to provide non-traditional students with the opportunity to progress from pre-university study through to a university Level 1 certificate in Islamic studies. Project workers were involved in a lengthy process of consultation with the users of a local Asian women's centre, FE adult educators and staff members from the university. The aim was to ensure that consultation was a collaborative two-way process. Initial reasons for individuals enrolling onto the course were found not to be to progress into higher education but rather:
I just thought it would be something different to do on a Tuesday morning.
My interest in Islamic studies was because I wanted to know more about my religion and be better informed to teach my children. Learning about our religion in this way means we have a lot more knowledge when dealing with those in the community who encourage a fundamentalist understanding of Islam – particularly on the issue of women and their role as mother and wife.

The North Yorkshire and Humberside Widening Participation (HE) Project worked in partnership to establish the **Gypsy and Traveller Participation Group** (Regan 2002). Aspirations of this community do not begin with education, never mind higher education. Their immediate aspirations are around social justice and equality. They want somewhere decent to live. For this group (and other hard to reach communities) widening participation has to work on the back of sustained community development. The project highlighted that activities are received much better when they have some tangible value. For example, the group facilitated a meeting of community representatives and city councillors and officers. Assisting this process, the University of Hull offered informal taster sessions in 'Communication and negotiation skills'. The sessions were well received and the skills learned were used in the meeting, as the community represented themselves.
Regan (2002)

NACRO – Lifeskills, South Yorkshire
The Lifeskills programme is a 19-week course which aims to give young people aged 16+ the opportunity to build confidence and improve their literacy, numeracy, communication and interpersonal skills so that they are prepared to progress to education, training and work. It gives disaffected young people the chance to re-engage, to take up opportunities they might otherwise not have had. Lifeskills participants are required to attend at least 16 hours per week, during which they take part in a range of vocational and educational activities. Participants are awarded with a certificate for each module they complete, and this boosts confidence and motivation.

4.6.4 Social relations

Spedding and Gregson (2000) found that the 'social relations of learning were perhaps the most crucial factor in decisions to come to, stay, or leave widening participation programmes of learning'. Recent research with students from under-represented groups in higher education also found that relationships between peers and staff were crucial to student success (Thomas 2002). The work of Spedding and Gregson and Thomas both suggest that building on existing social networks (eg by enrolling groups of learners who already know each other and get on well) and developing the social dimension of learning (eg via a collaborative pedagogy) are important to persistence. The latter is particularly significant when single learners join established groups, and thus activities to promote integration are of benefit. Social relationships are also seen as crucial in workplace learning, including relationships and levels of trust between employer and employee (Thursfield *et al.* 2004, Section 4.2).

4.6.5 Meaningful learning

Students undertake learning for a range of reasons, such as to assist with their children's education, to manage a problem, or to improve their employment prospects. Although educators are aware of the multiple and wider benefits of learning, the learning activity must be seen to be directly supporting the objectives of the learners too. Learning brokerage has a key role to play in terms of working with learners to explore and understand what they want from their learning, and for ensuring that learning providers are aware of these needs and meet them.

4.6.6 Support services

The importance of the provision of childcare is noted above, but student support services can provide academic/learning, social, financial and personal support to enable students to succeed (Thomas *et al.* 2002). Many 'non-traditional' students lack the confidence to access support, and thus services need to be proactive and integrated into the learning experience as far as possible. For example, with regard to higher education Dodgson and Bolam (2002) noted that mature students tend to have low confidence and this prevents them from seeking support. Proactive services raise awareness and challenge the assumption that they only exist for students with 'problems'. Proactive approaches include diagnostic testing, study workshops, the organisation of peer support groups and mentoring programmes. McGivney (1999) argues that a vital component in encouraging learning continuation and progression is group or peer support. Support can be integrated into the curriculum, but effective examples of this strategy are not widely available. The availability of support needs to occur throughout learners' engagement, and not just at the beginning. Learning brokerage can play a key role in developing an understanding among learning providers about the needs of particular groups of learners, and thus assisting them to plan to provide appropriate support. In particular, the main campus of an educational provider may be well served with support services, but these may not be extended to community or work-based learning opportunities. Within the current framework of 'Partnerships for Progression', sharing student support services

and, in particular, supporting HE students in further education and the transition of students from further to higher education, is a priority. Thomas and Slack (2002) found that support services are rarely available to learners in either the community or the workplace.

4.6.7 Facilitating progression

Progression can be either horizontal or vertical, but progression opportunities are structured by the sector. For example, in education funding mechanisms inhibit horizontal progression, whereas in the workplace employers may wish to restrict vertical progression. In learning in the community and voluntary sector there is little emphasis on progression, but rather on issue-based learning. Consequently, transition mechanisms tend to be much more highly developed in the education sector, or partnerships led by educational institutions. For example, college staff can visit students in a community or work-based setting prior to progression, and groups of learners can visit other learning sites. Thomas and Slack (2002) found that opportunities and support for progression in both the community and the workplace were limited. In the community it tends to be assumed that once you have attended a course, you can then travel much further to continue studying, but this ignores many of the barriers to learning and tends to assume that the barrier is motivational. In the workplace employers tend to have considerable control over the curriculum offered to employees, and in some cases may wish to restrict the levels to which certain types of employees can progress.

Utrecht Bridge

This is a partnership of educational institutions in the Netherlands which focuses on designing learning opportunities for individuals from ethnic minority groups at whatever stage or level that they enter: 'This approach is in contrast to the tradition of pushing students into existing programmes in order to meet the institution's needs' (Duvekot 1999: p46).

The Utrecht Bridge is built upon the concept of meeting individual needs by offering tailor-made courses in a wide range of subjects, starting at the level appropriate to the student and finishing in a successful position in society. This concept is referred to as a flexible, continuous learning path. It involves the following stages:
■ assessment – linking wishes and skills to appropriate learning
■ scoping – pilot project seeking to understand the needs of pupils from ethnic minority students in school
■ bridging courses – transition programmes that assist refugees to participate in further education
■ counselling, mentoring and tutoring – promoting a career through higher education
■ entering society – facilitating progression into employment, family life etc
■ teacher training – to develop their skills at teaching a multicultural society
■ portfolio – every student builds up an educational portfolio through a work placement.

The **North London Mentor Programme** began in 1989 and was the first student mentoring programme in Britain. It was established in response to:

■ poor achievement and retention levels among black students
■ over-representation of black students on lower level courses
■ the need to widen access to higher education for black students
■ the lack of opportunities for young black people in skilled and professional employment.

Mentees are aged 16–25 and of mixed abilities, and mentors come from a range of backgrounds (eg academics, business people, media personalities). Mentors provide work experience, work-shadowing and job opportunities to mentees. The programme has been extremely successful with the following benefits to mentees: improved grades, developed qualities and skill, increased confidence and, for a significant number, progress to higher education. Mentoring is now a major student support activity with more than 1000 schemes operating in educational institutions.
Jeffrey (2002)

4.7 Addressing organisational issues

This overarching section examines a number of key issues relating to the organisation of the learning brokerage process. There will, however, be different levels and types of organisation required by brokerages in different sectors and of different scales. The issues covered are capacity building, partnerships and collaboration, the role of ICT in learning brokerage, and monitoring and evaluation.

4.7.1 Building brokerage capacity: supporting staff and volunteers

The consultation found that brokerage is not a single thing; for some it is very informal, while for others it is a role they are employed to do, and for others again it is in addition to their primary role, or is undertaken voluntarily. Sometimes this work is organised through a formal partnership, or it may involve working together through a less formal network of individuals and agencies. Brokerage capacity is also dependent on the context. It is, however, important that all the people involved in working with learners and providers to promote wider engagement are supported in their work. In the workplace this necessitates commitment to learning on the part of management (Thursfield *et al.* 2004, Section 4.2).

Community brokers

The capacity required will differ in nature according to the context. For brokerage at a community level McGivney (2000) highlights the importance of having 'the right staff' with 'the right skills' for engaging excluded groups with learning. Drawing on work carried out by the Oxfordshire Strategic Partnership, she argues that staff should possess similar characteristics and backgrounds to the target group and possess wide-ranging skills including: 'good listening and communication skills; organisation skills; the ability to deal with a range of individuals and organisations at all levels; the ability to develop and maintain arrangements in diverse locations; and the ability to recognise and utilise local services and resources' (p3). Similar conclusions are also drawn by Lynn (2002a) and Webb and Dawes (2002). The importance of link workers with local knowledge and ties is also confirmed by Thomas *et al.*

(1999). However, although local knowledge is clearly important, there also needs to be more attention within the literature to tensions and exclusions within communities (see Quinn 2004b). The assumption, for example, that all those of the same ethnic group will have the same priorities or power is naïve at best.

Bridge-Over Mardyke, Rainham, Essex
In 1999 it was estimated that about 80% of the people living on the Mardyke estate were in need of basic skills education. Using a variety of funds, a 'learning flat' was opened on the estate, and a second flat above with an IT suite was opened later. These provided a space in the heart of the town where people could access learning opportunities. All courses are free and childcare is provided. Many of the tutors shared personal experiences with learners and learning takes place at the learner's own pace. An ambassadors programme has also started, where learners go out into the community to promote the project and encourage others to join. Two empty shops on the estate are being converted into a 'learning shop'.
Adult and Community Learning Fund Project

Training
This is (perhaps) the first research project to explore in detail the process of learning brokerage. The consultation suggested that there was consensus regarding some of the qualities needed by those individuals engaged in brokering activities. These included being empathetic and supportive, and having specific and often local knowledge. Individuals become involved in brokerage through a wide range of routes. Although the literature, including Thursfield *et al.* (2004) on workplace brokerage, emphasises the importance of initial and ongoing training, there is no universal training available. The Basic Skills Agency has been active in providing broker training and Cutter (2002) indicates that satisfaction with this training was high. However, in the longer term, further support was needed for some to enable them to become effective. Training needs include understanding the concepts of basic skills, building confidence in the delivery of the brokerage service, and ongoing networking between brokers and between brokers and providers. In the pilot projects (1999–2001) up to 70% of brokers trained were not active in the scheme one year after initial training. Although in the national programme (2001–2002) early indications are that the 'activity' rate is significantly higher, sustainability is clearly a pressing issue. Those 'dropping out' highlight that competing priorities, confusion over funding and lack of momentum in the scheme were barriers that prevented them from continuing. In the Staffordshire Strategic Partnership link workers (equivalent to learning brokers) came from a wide range of backgrounds, including community education, social work and the education sector. Each of the link workers brought with them a wealth of useful knowledge and skills, but an OCN qualification enabled them to build up a portfolio of experiences and knowledge to equip them for their role. The training also had the advantage of bringing link workers together, thus overcoming some of the isolation of working alone, and allowing the sharing of ideas for effective practice. It is likely that those involved in more informal brokerage will have access to little or no training, while those engaged in more formal brokering activities and/or

working in certain sectors may well benefit from staff development. By examining learning brokerage in different contexts we will be able to explore both the training provided for learning brokers and the needs expressed by them.

Fast Forward

This is a county-wide education strategy in Nottinghamshire which successfully piloted signposter training projects. These offer NVQ accredited training, work placements and job search support for small teams of volunteers who will deliver a specialist local service providing information and guidance on education, training and employment.
McGivney (1999)

Peer support

The practitioners panel and the participative conference both noted the fact that many learning broker staff work in isolation, and thus they valued meeting up at these events, and sharing experiences and frustrations. Some of the comments from the evaluation of the participative conference illustrate this:

What value do you think you have gained from the conference?

Finding out what other projects/networks exist. The list of projects and contacts was very useful.

An opportunity to meet new people and benefit from their good practice.

Have there been other benefits from taking part?

Networking with others.

Made some useful contacts.

Networking and sharing experiences.

Boundaries and supervision

In previous work in the education sector individuals engaged in brokering activities have experienced a lack of support and 'supervision' (formal debrief) from their line managers (Thomas *et al.* 1999). While line managers may have operated an open door policy, respect for managers and demands on link workers' time mean they do not take up this opportunity, and thus can become overburdened both with the volume of working they are undertaking, and the nature of it. For example, within certain types of learning brokerage relationships (eg more informal) learning is not discussed in isolation, but rather may involve discussing an individual's life experiences. For some, participation in learning is associated with a personal change of circumstances (eg divorce, separation, bereavement, children leaving home), and in this situation brokering is far more than simply providing information, and involves overlap with counselling. Supporting learning brokers to set personal boundaries and to know when to pass people on to more specialised agencies, and coping and being debriefed after dealing with traumatic experiences seems to be important, but there is little written about this role in relation to brokers. While it is more likely that informal community-based learning brokers may experience more boundary and support issues, it may also be that a work-based learning broker may appear the only sympathetic ear in the workplace, and may find it more difficult to create space. Thursfield *et al.* (2004: Conclusions) discuss 'the complex milieu' of the workplace in

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which a competing range of organisational factors such as workplace relations, levels of trust, management attitudes and the nature of work and working patterns have to be negotiated in finding suitable times, places and opportunities for brokerage.

Recognition
In the community setting, Thomas *et al.* (1999) observed the importance to link workers of feeling that their role was valued by the colleges they were working for, and in the workplace. Cowen *et al.* (2000) found that eight out of ten union learning representatives face some form of barrier in carrying out their learning representative activities. The barriers faced are mostly linked to the lack of formal recognition of the learning representative role. This means that learning representatives lack time to carry out duties and lack support from employers and in some cases from others within the union, which creates difficulties in convincing some colleagues of the legitimacy of learning representative activities. The key barriers faced by learning representatives are:
■ lack of time for learning representative activities
■ lack of interest or even suspicion from colleagues
■ lack of support from management
■ problems in finding suitable courses to suit (shift) workers' needs
■ the limited availability of Individual Learning Accounts (ILAs), when these had been promoted as a method of supporting learners into learning
■ lack of formal recognition with the union structure.
Thursfield *et al.* (2004, Section 3.1) propose that the continued strengthening of the trade union learning representative through the introduction of statutory rights will be one of the key drivers in the future development of learning brokerage in the workplace.

4.7.2 Networks and partnerships
Given our understanding of learning brokerage, not as an individual role but rather as a process in which a range of organisations and individuals need to be involved, collaboration is essential to effectively bring together and coordinate the different constituent people and agencies. Indeed, cross-sectoral working is central to facilitate networks of learning both within the community (NIACE 2000) and the workplace (Cutter 2002). However, the types of networks and partnerships required are likely to differ across sectors. Networks tend to bring together individuals and groups in less formal ways, while partnerships are more formally organised, and are often organised in response to a funding stream and/or government policy initiative. There is much more written about this latter type of collaboration than the former, reflecting the policy drives in the arena of lifelong learning. In some sectors, such as education and the workplace, internal collaboration may also be an important issue, to ensure that the organisation as a whole is able to support learning (Thomas 2002).

Aims and objectives

Much research on partnerships has demonstrated the importance of clear aims and objectives which are shared by all partners (McGivney 2000; NIACE 2000; Thomas *et al.* 2001; Jude 2003). Thomas *et al.* (2001) found that many partnerships lacked a shared vision. In a survey of trade union learning representatives Cowen *et al.* (2000) found that approximately half of the responding brokers faced difficulties because of a lack of clarity as to what basic skills providers do and how they develop basic skills in the workplace. In developing the aims and objectives partnerships should take account of the needs of the target group (NIACE 2000). A problem tree can be a useful way to start to identify the core problems and develop the objectives of the partnership (see below). In a community setting it is suggested that the objectives of a network or partnership should be developed by identifying and working with the strengths and weaknesses of each of the partners (McGivney 1999). In more formally orchestrated partnerships, such as in the education sector, the literature recommends that partners should be carefully selected to meet the needs of the partnership (NIACE 2000; Thomas *et al.* 2001).

Identifying core problems and creating a problem tree

Problem trees can be used to identify core problems. Participants are encouraged to write the problem(s) faced by the target group on pieces of paper. These are then arranged into a tree form, illustrating the relationship between problems, thus how one problem leads to further ones. Priority problems can be clustered and gradually worked into a hierarchy.

The objectives tree

By reversing or negating each aspect of the problem tree an objectives tree is created. Some areas need refining and developing and the problem tree may change in structure as new ideas come to the fore. Feasible and agreed interventions are taken from the objectives tree. These will be key items which will feed into the partnership aims and objectives.

Identifying partners

The issue of who is involved in networks and partnerships will be determined by the aims of the collaboration and the sector in which it is working. For example, in a community setting, working in a bottom-up way, all interested parties will be worked with, but in more tightly focused partnerships it may not be helpful to include anyone and everyone. For example, in the education sector Thomas *et al.* (2001) found that involving too many organisations can be problematic in terms of competing agendas and direct competition for learners. Jude (2003) notes that securing the support of 'key movers and shakers' helps to secure success, but everyone does not need to be involved all of the time. A stakeholder analysis can be used to identify who all the potential partners are (or who needs to be influenced), what their interest in the project is, and what their strengths and weaknesses are. This can be used when developing the project plan to ensure that appropriate people are involved at the correct time.

Stakeholder analysis

It is useful to identify all the stakeholders and categorise them into:

■ beneficiaries
■ affected groups
■ decision-makers
■ community leaders
■ potential opponents
■ funding agencies
■ implementing agencies.

This can help to ensure that the appropriate people have been involved in the partnership.

Community representatives have much to offer but are often marginalised or excluded from more formally organised partnerships (Slack 2004). Jude (2003) highlights the power relations that inhibit the involvement of (potential) learners. The use of alienating and unfamiliar language and partnership structures that do not allow for community engagement and formal meeting structures can act as barriers to community involvement (Mayo 1997; Balloch and Taylor 2001; Fernie and McCarthy 2001). Browne and Rampersad (2002) decided to involve local people in the steering group of the Islington Handholders' Project on the basis that learners themselves are key to solving issues around access and success in learning. Although some difficulties were encountered, this structure made it easier for local people to become involved and voice their opinions.

Transparent structures

To avoid confusion and tension, successful networks and partnerships tend to have transparent management structures. In networks, this is likely to involve openness to all local groups, ability to influence the work of the network and avoiding hierarchies. Within partnerships a number of authors suggest that roles and responsibilities should be agreed by each organisation, and ideally in a written document, and this should be supported by a named contact in each organisation. Cutter (2002) found that feedback from both providers and brokers stresses the need for the reaffirmation of roles and responsibilities. In addition, brokers stress the need to emphasise to some providers that the delivery of the brokerage service is a joint activity. In some cases the current focus is seen, as one broker expressed it, as 'a one way street'. Drawing on their research, Waters and Moran (2002) advocate the 'Community Partner Contract', which is a formal contract and outlines what each partner can expect from each other.

Communication

One of the main reasons why people do not participate in networks and partnerships is poor communication; they don't know about the collective activity, or they don't think it is relevant to them. Within the community setting, friendship and word of mouth can either encourage people to participate, or discourage them, for example because they are not part of the clique. There is a clear need for effective communication in educational partnerships (Watt and Patterson 2000; Dinsdale 2002), and this should be between partnership members, within institutions and externally. In formal partnerships, a central administrator can facilitate communication.

Funding issues

Funding can be a contentious issue. McGivney (1999) notes the importance of secure and stable funding and developed mutual trust, openness and transparency. The Well Read Project (Haswell *et al.* 2002) involves voluntary, statutory and community partners. These authors also note the importance of continued funding, and the importance of ensuring each partner organisation makes a 'fair' contribution to the costs of the project, or equally, it could be argued, benefits similarly from external funding the project receives. Thomas *et al.* (2001) not only advocate financial transparency and commonly agreed mechanisms for distributing income but also suggest that funding should be set aside for administration, monitoring and evaluation. Community groups often feel marginalised in partnerships as they do not have access to funding.

4.7.3 Technology based brokerage

Information and communications technology (ICT) has been identified by the government and many educational practitioners as having the potential to overcome social exclusion (Selwyn *et al.* 2001). Numerous initiatives have been developed in response to this. For example, UK Online Centres were developed 'to bridge the gap between those in society who have access to and are able to use information and communications technology competently, and those who do not'. Wired Up Communities is another initiative which aimed 'to ensure that those people and communities that currently experience social exclusion were not further excluded' (Devins *et al.* 2003: pii).

Citizens Online
This is an independent not-for-profit organisation that is committed to universal internet access. Citizens Online is:
■	exploring the social and cultural impact of the internet
■	promoting universal internet access
■	acting as a national voice on all issues developing around the e-environment
■	creating a conduit between government, industry and the voluntary sector
■	forming a central bank of key research and data.
www.citizensonline.org.uk

However, to date, there has been 'little empirical analysis of how ICT is actually impacting on patterns of lifelong learning in the UK' (Gorard 2002). Early work by Gorard and colleagues and evaluation work of government initiatives suggests a cautionary note. There are a number of issues. Gorard (2002) notes that a key selling point of ICT has been that it overcomes barriers of time and space. However, drawing on the 2002 NIACE survey of adult learners in Wales, he argues that such barriers are not widely reported. In addition, he argues that the patterns of learning and non-learning in terms of age and class are largely repeated in terms of access to technology itself: 'Access to ICT continues to be largely patterned according to long term pre-existing social, economic and educational factors'. Although he is not completely negative about ICT, he asserts that it does not appear to be having the beneficial impact 'many politicians and educators would have us believe'. Also much of the ICT-based provision is either repackaged 'old'

educational provision and courses or a narrow provision of new courses. Such criticisms are given more weight by initial evaluations of government initiatives. In particular Devins *et al.* (2003) found that despite free provision in the home almost a quarter of individuals involved in the Wired Up Communities programme had not used the technology to access the internet. Reasons put forward included 'lack of interest' and 'lack of time'. There were also issues in some areas around being able to use the computers: 'access to computers is not the same as having the skills to use them'. This point is supported by evaluation of the UK Online Centres (Hall Aitken Associates 2002). This evaluation found that 61% of users are in the target groups in terms of social and economic status; however, the most excluded groups are not using the centres in great numbers.

Internet Mentor Project, Manchester Women's Electronic Village Hall
This project aims to train refugee women to become 'internet mentors', able to help other women in their communities to use e-mail and the internet to network locally and internationally with families and friends.

Work has also been carried out on the effectiveness of other 'technology brokers' (eg Learndirect and Ufi). Watts and Dent (2002) have explored the use of telephone helplines in career information and guidance. They argue that such developments reflect wider transformations in service delivery: 'Increasingly … consumers want a service to be available when they identify a need for it, with minimum delay and minimum effort: they want it here, and they want it now'. Part of the rationale behind Learndirect was that it would reach non-traditional learners. However, they quote evaluation work that found that only 8% of callers had no or very low levels of qualification, compared with 36% qualified at first degree level or above. Watts and Dent discuss the advantages and disadvantages of the telephone for 'helping purposes' over face-to-face interactions. McGivney (1999) has also highlighted that telephone guidance systems are not always appropriate for the people least represented in formal education and training: 'For many groups in the community the most effective guidance is informal and delivered face-to-face. For those without a clear idea of their future direction or without access to a telephone, helplines are not the best option' (p89).

Research by Selwyn *et al.* (2001) on the emergence of a 'digital college' in Wales found that 'as with many other forms of lifelong learning, the survey merely suggests that the Acen Website was being used by the "usual suspects"'. Their findings suggest that 'merely providing learning opportunities via the internet may not necessarily be enough to substantially increase levels of learning – particularly among those groups currently excluded from learning'. They conclude (p217):

Instead of repackaging and delivering existing traditional materials via the internet, lifelong learning providers should consider how the internet can add value to the learning process via its more innovative features. Moreover, of utmost importance to providers … is how non-participants can be encouraged and attracted to engage with learning of any kind (whether 'off-line' or 'online') if the e-learning society is not to merely replicate the patterns of inequality it set out to replace.

Much, therefore, has been speculated about the role of ICT in relation to lifelong learning. Will it enable anyone, anywhere, to undertake whatever learning they are interested in, or will certain groups be excluded and further marginalised by the 'digital divide'? The way one responds to this question will influence the role accorded to ICT within learning brokerage activity. But, drawing from the literature it is apparent that there are different roles that ICT can play, and thus, in the next phase of the research, we will be keen to explore both the extent to which ICT is seen as a saviour or a villain, and the alternative functions accorded to it. Consequently, Work Package Two will examine the role and/or potential role of ICT within each case study and one case study will focus specifically on this aspect of brokerage.

4.7.4 Monitoring and evaluation

Most learning brokerage activity is under some obligation to be accountable for its activities and successes. For example, in the voluntary and education sectors much of the funding for brokerage comes from external agencies, who are keen to see the achievement of numerical targets such as the number of potential learners contacted, the number enrolled and the number who have completed their course. Such numerically based performance indicator mechanisms are largely inappropriate and ineffective. As the practitioners have pointed out in this research, the process of learning brokerage is time consuming, it involves lots of small steps (some of which are 'backwards') and the impact is very long term (eg over generations). There is therefore a need for both soft indicators that take account of outcomes such as greater self-confidence and better time-keeping, and for evaluation tools and approaches that take account of the unanticipated and longer term benefits. But, as Taylor and Cameron (2002) suggest, more information is needed about these types of learning outcomes. Tyers and Aston (2002) have pointed out that not only is evaluation focused on short-term accountability inappropriate, but also it can be off-putting for learners. It is this type of accountability that prevents courses running with fewer than a specified number of participants, and thus courses may be cancelled, undermining the preceding learning brokerage. Other authors have commented that this form of evaluation encourages false reporting (ie exaggerating successes) (Chambers 1992) or encourages practitioners to adapt their practice to meet targets as opposed to genuine need (Lawrie, no date).

Learning brokerage can also benefit from formative evaluation, which is ongoing and internally oriented, with the intention of learning from experience and improving practice. At the simplest level evaluation for learning can imply just improving current activities. This form of single-loop learning enables us – if we are open to accepting error – to perform our current activities better. The concept of double-loop learning is based on the idea of challenging the underlying assumptions; thus, it is not simply about improving what we are currently doing, but rather about questioning whether these are the most appropriate activities. David Korten (1984) has written about the ways in which organisations respond to critical feedback. He identifies three types of organisations based on their response to problems. The first is the 'self-deceiving organisation', which hides error – or blames another party. The

'defeated organisation' sees error as beyond their control, and 'thus while adverse factors may be discussed in rich detail, no action is taken' (Korten 1984: p185). A 'learning organisation' learns from mistakes and constantly improves and challenges its practice.

Not only is there a need to improve practice, but also to embed what works on a strategic level, rather than adding new initiatives. The contemporary 'initiative culture' seems to be ahistorical, and thus ignores the pioneering work of learning brokers in the third sector. This is a strength of this research project, that it is seeking to learn from existing practice within a wide range of contexts.

While many externally oriented accountability systems are inappropriate and even harmful for learning brokerages, there are arguments to be made for formative evaluation and learning. However, previous research in related areas (eg Thomas *et al.*'s (2001) examination of FE and HE partnerships and Wallace *et al.'s* (1997) work on UK voluntary organisations) has found that research, monitoring and evaluation is weak, and thus there is a lack of organisational learning, and a tendency to re-invent the wheel.

LEAP (Learning, Evaluation and Planning) is a tool that provides a comprehensive framework for the planning and evaluation of community learning (commissioned following the Scottish Office report (1998) *Communities: change through learning*). The package is designed to provide a common framework for planning and evaluation which can be used when different stakeholders are working together to deliver community learning. It is a self-evaluation package, aimed at quality improvement. It is based on the following principles:
■ evaluation should be an integral part of promoting community learning
■ both providers and service users take part in it
■ they do so to achieve continual improvements in effectiveness and efficiency
■ they feed the lessons into their planning of future work.
It enables users to:
■ clarify what is involved in community learning
■ plan their activities
■ identify evaluation indicators which are appropriate
■ provide evidence of what has been done
■ provide evidence of what difference it has made to individuals and communities
■ learn from their practice experience to improve their effectiveness.
Barr (2002)

Participatory action research can be used as part of an evaluation strategy, as it examines the processes rather than simply concentrating on the inputs or outputs as traditional evaluation methods do. This approach also recognises the unique features of any process aimed at change. It involves the stakeholders – the learners, the practitioners and other partners – in the evaluation decisions, such as what data is collected and how, how it is analysed and how it is interpreted and acted upon.
Thomas (2000)

The **peer ethnographic method** is designed to be less costly and quicker to use than sample surveys or large-scale participatory exercises, and is aimed at providing types of data that are not easily produced by these other methods. It is based on the anthropological approach, in which a relationship of trust and rapport is built up between the researcher and members of the community. The peer ethnographic approach involves interviewing a small number of people, and recognises that what they say about key areas of their social life changes as a relationship of trust develops with the researcher, and it may change according to the context in which they are talking. Thus, the research is carried out by trusted members of the community (peer researchers), who undertake in-depth interviews with a small number of people by whom they are considered peers. The aim of the interviews is not to collect individual accounts of personal experience but rather to collect data to develop understanding about the way people talk about and experience social life and social behaviour; thus, the interviews are conducted in the third person, and interviewees are asked to talk about 'other people like them'. People do talk about their own experiences, but do not always recognise this, and thus sensitive issues can be addressed more easily.

Hawkins and Price (2001)

5. Conclusions from Work Package One

This report forms the foundation of a three-stage major research project on learning brokerage. It employs a range of research methods and draws on a combination of primary and secondary data in order to define brokerage and outline the characteristics of good practice. It has essentially been a scoping exercise, drawing on grey and published literature, plus the tacit knowledge of practitioners, to clarify what brokerage is and establish a framework of how it operates. The involvement of professionals and practitioners has generated useful data and also assisted the interpretation of the existing literature. There is much literature which is tangentially relevant to brokerage but very little which focuses on brokerage itself. This report begins to fill that gap.

5.1 Defining learning brokerage

- The report develops a definition of brokerage as a process undertaken through a network or chain of individuals and institutions. It does not deny that personal qualities and relationships are important, but in themselves they are not enough. This corresponds to Thursfield *et al.* (2004), who place much emphasis on the strong influence of personal qualities (on both a positive and negative level) of those engaged in workplace brokerage, but stress that if structural factors make learning opportunities impossible no amount of individual intervention can make a difference. The essence of brokerage is to mediate between learners and providers. This involves being able to look in two directions at the same time: to be able to both interpret the needs of potential learners and understand and influence the bigger picture, in terms of what learning opportunities could and should be available to them. To be effective in this regard requires bringing together and creating networks to support the diverse nurturing and support needs of learners and to orchestrate the understanding and change required of learning providers.

- The report also emphasises the context-specific nature of learning brokerage. It identifies four key domains where brokerage may take place: community, work, educational institution and voluntary sector. Within each domain different elements of the process are emphasised and prioritised and these are driven by different context-specific incentives. Working effectively depends on generating appropriate forms of credibility and added value. Working across the sectors requires robust partnerships since the domains are divided by different values and ways of working. Thursfield *et al.* (2004) also emphasise the importance of contexts and demonstrate that within the domains themselves, in their case the workplace, there will be conflicting approaches to learning which impact on the ability to conduct brokerage effectively.

- The report identifies three different levels of brokerage: very informal (suggestion and comment), more formal (providing advice), and strategic (working to change structures). Brokerage can be both paid and unpaid There is some correspondence here with Thursfield *et al.*'s development of four ideal types of workplace brokerage. The report emphasises the fluid and dynamic nature of brokerage and the sense that it is a long-term process. The complexity of the process is echoed by Thursfield *et al*.

- The report concludes that there are many barriers to brokerage. Potential learners are actively marginalised by social factors such as poverty and unemployment rather than being passively 'hard to reach'. Learning brokerage requires time and local commitment and short-term funding threatens its survival. Those undertaking brokerage are often overburdened and struggling against a system which is essentially inimical to their work. Success can be constrained by limited conceptions about what constitutes 'significant learning' on the part of policy-makers, funders and providers. Thursfield *et al.* (2004) similarly demonstrate how employers' narrow attitudes to training needs can block learning opportunities for employees.
- Four key factors are essential to the development of learning brokerage nationally: recognition and dissemination of good practice, adequate and systematic funding for all sectors involved in brokerage, improved opportunities to work cross-sectorally, and consultation with potential users.

5.2 Developing a brokerage process framework

The report concludes that there are six key stages of learning brokerage. Progression between stages is by no means seamless or uncontested and the process is not linear but cyclical and iterative. Moreover, although each stage is vital it is highly unlikely that one person will engage with every one.

- *Understanding the current situation*. This is the stage at which effective groundwork must be done to understand who the learners are and what they are learning, who is providing learning opportunities and what the gaps are. Key activities at this stage are research, targeting, consultation and collaboration. The report particularly stresses the importance of primary research as opposed to making assumptions about local need. It also argues that lack of informed targeting reproduces inequality as 'open' learning opportunities tend to benefit already privileged groups.
- *Gaining entry and building trust*. This is the point in the brokerage process where access to potential learners is sought and relationships of trust developed. It involves ongoing consultation, negotiation with gatekeepers, exploring and establishing informal links, and establishing relationships with formal brokers. The emphasis on mutuality is also developed in Thursfield *et al.* (2004) in relation to brokerage in the workplace. Raising false expectations is a potential issue at this stage of brokerage and this is both a personal and a structural issue. The report emphasises the importance of forging links via those who have ties to the target group or those who constitute their peers. Thursfield *et al.* also conclude that those most effective at brokerage in the workplace tend to be peers rather than managers.
- *Making learning meaningful*. Making learning a meaningful possibility to excluded potential learners tends to be the crucial missing part of the brokerage jigsaw. To do this involves working at a deep 'identity' level. The key processes here are engaging with potential learners to develop informed understanding, linking learning opportunities to the context of their lives, developing awareness of structural barriers, using strategic approaches such as informal learning, being tactical and starting from where people are. Learning brokerage can be a means of dealing in a realistic way with the realities of social exclusion as it involves working very gradually at an incremental level in a context-specific and reflexive way.

- *Identifying the right learning opportunity*. For brokerage to succeed potential learners must be made aware of meaningful and appropriate learning opportunities. This is a twofold process: learning providers also need to be helped to develop provision which meets needs and builds on existing skills and knowledge. Brokerage can either help learners down formal pathways to learning or it can use a more informal approach, building on the accreditation of prior learning and helping the learner to build the path themselves out of the materials of their past experience. Key factors here are the ability to use informal 'hot' knowledge about learning and to build effective learner support in transition and progression.
- *Promoting learning success*. Learners must be supported to achieve their own learning goals and the brokerage process extends beyond entry into a learning situation and includes ongoing work with learners and providers. Key factors here are adequately preparing the learner, giving them clear information on potential costs, working with learners to explore what they want from learning, developing appropriate pedagogy and curricula, building social networks of learners and facilitating both horizontal and vertical progression.
- *Addressing organisational issues*. Brokerage implies and requires organisational development and change. This is a point that Thursfield *et al.* (2004) reiterate with respect to the workplace and they particularly stress power relations and the need for broker autonomy. The key issues identified by this report are capacity building for those involved in brokerage at both a paid and voluntary level, partnerships and collaboration, using IT effectively in brokerage, and monitoring and evaluating brokerage. Strategies here include training opportunities, sharing experiences via networking and support in setting boundaries. The vital importance of recognising the contribution of brokerage and adequately funding it is stressed.

This report and the directory of learning brokerage draw together a very wide range of examples of learning brokerage and this is likely to be only the tip of the iceberg; brokerage is happening everywhere and has been for many years. Yet such research as exists tends to be small-scale and localised. There is relatively little evidence that relates to how good practice is developed and embedded. In particular, we know little about how brokerage is enacted on a day-to-day basis, what constitutes brokerage success, how it differs from other processes and what its particular contribution might be to engaging educationally marginalised and excluded adults. In order to move from small to larger scale interventions, improved conceptualisations of success are required coupled with appropriate evaluation processes. Developing such conceptualisations will be the work of the next phase of this research project.

5.3 Draft Work Package Two
The following section gives draft details of the second phase of the research project. This will undergo refinement and development as part of the process of Work Package Two and will be discussed fully in the next research report (which will also include an in-depth discussion of the rationale for the selection of the case studies).

5.3.1 Criteria for selection of case studies

■ Domains: two case studies in each of the following – the community/the workplace/educational institutions/the voluntary sector.
■ Size of brokerage.
■ Marginalised groups and communities.
■ ICT.
■ Geographical spread.

5.3.2 Research methods

Each case study will be visited for a period of 2 days by members of the research team to allow the research team to interview brokers, managers, staff, learners, potential learners and other agencies, and to develop an understanding of the context in which the brokerage operates.

■ Interviews/focus groups will be carried out with representatives from administration, managerial staff, frontline staff and learners.
■ Visual mapping methods will be used as part of the interview/focus group process to form patterns of working with other agencies. Mapping exercises utilising flow diagrams have been used in participatory research approaches to illustrate the nature and strength of relationships between individuals and agencies. Not only does this give interesting insights into relationships between agencies, but it also highlights differences in priorities between individuals and case studies.
■ Interviews will also be conducted with learning providers to explore their perceptions of the role of learning brokers.
■ Two researchers will conduct 'street corner' research in locations such as shopping centres, public houses and leisure centres in the vicinity of the case studies. This will enable the views of potential learners to be canvassed. This stage of the research will focus specifically on accessing hard to reach groups such as the homeless, unemployed and ethnic minority groups. This research method will also reveal patterns of informal brokerage which take place within the family.

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Appendix 1 – Pro forma

Building bridges between learners and learning providers: the 'Learning brokers' project

The Institute for Access Studies is carrying out a research project funded by the Learning and Skills Research Centre (part of the Learning and Skills Development Agency) to investigate the role of learning brokers in building bridges between learners and all types of learning. The term 'learning broker' is used in this context to refer to individuals and organisations that act as intermediaries to motivate and support adults (post-16) to become involved in learning, and to help them to succeed. The research, which will also include examples drawn from outside the education sector, seeks to involve brokers working in both formal and informal settings and will have a particular focus on hard to reach groups. The aim of the research is to develop understanding of the differing patterns of interaction between (potential) learners, brokers and learning providers in different contexts, identifying effective approaches to brokering in relation to specific groups and communities.

The project will examine brokerage in the workplace and within the community. Types of individual and organisations we are seeking to involve include, for example, trade union learning representatives, voluntary organisations, faith groups, and arts, sports and leisure projects. The research will be divided into three phases, the first of which is based upon an open invitation to those with learning broker experience or knowledge to contribute to the research via a short questionnaire, and to nominate examples of learning brokerage within the UK. This consultation will then inform a further two research phases, the first of which will incorporate a number of case studies selected from the nominations received during phase 1 of the research. The selection will include examples of brokerage in the workplace, the community, rural and urban areas, and those working with specific hard to reach groups or neighbourhoods. The final phase will involve action research partnerships with learning brokers in which strategies for successful brokerages will be developed. Each phase will also include a participative conference to enable stakeholders to discuss the findings and inform the research process. The research will be completed by August 2004. A short pro forma is attached which covers overall comments and information relating to specific brokerage examples. Further copies of this are available on our website www.staffs.ac.uk/access-studies.

Please return the completed pro forma by _____ to
Kim Slack,
Institute for Access Studies, Staffordshire University,
College Road, Stoke-on-Trent, Staffordshire, ST4 2DE.
Tel: 01782 295731
E-mail: k.b.slack@staffs.ac.uk

Staffordshire
U N I V E R S I T Y

Contact name: ....

Role of contact person: ....

Contact address: ....

.... E-mail: ....

We have used the term 'learning broker' in this context to refer to individuals and organisations that motivate and support adults (post-16) to become involved in learning, and help them to succeed. Could you explain your understanding of the term, or any other similar terms that you use?
....
....
....

What are the key characteristics of learning brokers?
1) ....
2) ....
3) ....
4) ....
5) ....

What are the advantages of the role?
....
....
....

What are the disadvantages of the role?
....
....
....

What are the key drivers in the future development of learning brokerages?
....
....
....
....
....

What are the barriers to developing effective learning brokerages?
....
....
....

We are seeking examples throughout the UK of learning brokerage. Examples can be drawn from sectors other than education and include those situated in the workplace, the community, rural and urban areas, and those working with specific hard to reach groups or neighbourhoods.

Title of example:...

Location (eg town, county etc): ....

Contact person:...

Role of contact person: ....

E-mail: .... Telephone number: ....

1. Can you give a brief description of the brokerage? ....
....
....
....
....
....
....
....
....
....

2. Does it target a specific group or community? If so, please give details: ....
....
....
....

3. Which learning providers do you work with and what type of learning is involved (eg formal or informal, academic/vocational/leisure)? ....
....
....
....

4. Where does the learning take place? ....
....
....
....

5. How long has the brokerage been in operation?...
....
....
....

6. How is usage and/or impact monitored?...
....
....
....

7. Do you feel that the service is well used? ....
....
....
....

8. How do you feel it could be improved? ....
....
....
....

9. What difficulties have you encountered and are there any weaknesses you can identify? ....
....
....
....

10. How do you feel this research could be of benefit to you?
....
....
....

Appendix 2 – Pro forma distribution

Action on Access network
Adult, Advice and Learning Partnerships
British Educational Research Association – special interest group for lifelong learning
Business Links Network
Campaign for Learning
Communities Scotland
Community learning broker, Portsmouth
Community Learning Scotland and Scottish Community Based Adult Learning Development Centre
Connect Youth Scotland
Connexions
Council of Minority Ethnic Voluntary Sector
Editorial Advisory Board of *Widening Participation and Lifelong Learning*
Education Action Zones (Team Leader, DfES)
Education Guidance Service for Belfast
Foyer Federation
Further education colleges
Higher education institutions
Home-Start
Learning partnerships
Learning and Skills Councils
Local education authorities
National Association for the Care and Resettlement of Offenders
National Association of Councils for Voluntary Service
National Council of Voluntary Organisations
National Institute of Adult Continuing Education
National Youth Agency
North Yorkshire Forum for Voluntary Organisations
Northern Ireland Council for Voluntary Action
Paulo Organisation
Scottish Adult Learning Partnership
Scottish Council for Voluntary Organisations
Small Business Service
Sure Start (via DfES)
The Third Sector
TUC
Ufi
University of the 3rd Age
Voluntary Sector Network for Learning (Cornwall and Devon)
Wales Council for Voluntary Action
Women's Institute
Workers' Educational Association
Workplace Basic Skills Network
Young Adult Learners Partnership (NIACE and NYA project)
YWCA and YMCA

Appendix 3 – Practitioner panel members

Jennifer Adshead	Education and Training Director Denman College
Jan Barber/Aileen Gilhooly	Leeds Metropolitan University
Sally Benn	Newcastle Voluntary Training Project
Jay Gardiner	Events Coordinator North Staffs Racial Equality Council
Alan Hatton-Yeo	Beth Johnson Foundation
Brenda Jackson	Staffordshire Learning and Skills Council
Kathryn James	NIACE
Gay Lobley/Dawn Walker	Basic Skills Agency
Pauline Lynn	Teesside University
Catherine Maxwell	Citizens Online National Project Manager
Pauline Murphy	TUC National Development Worker Union Learning Fund
David Peet	Regional Manager (Midlands and East Anglia) The Big Issue Foundation
Jane Samuels	Access and Widening Participation Coordinator Ravensbourne College of Design and Communication
John Williams	District Secretary WEA London District

Appendix 4 – Participative conference delegates

Participative conference on Monday 17 February 2003

Jo Astley	Institute for Access Studies
Peter Beaney	Staffordshire University
Simon Beer	Workers' Educational Association
Sally Benn	Voluntary Sector Training Project
Sarah Bonham	Everybodyonline
Ken Calvert	Training Advisory Services Ltd
Lorraine Casey	Institute for Access Studies
Andrew Childs	Community Council of Devon
Liz Collins	Student Services, University of Central England
Peter Davies	Institute for Education Policy Research
Carmel Dennison	Institute for Access Studies
Michael Dodd	York Consulting
Michelle Gleadall	Ufi Ltd
Jeanne Godfrey	University of Westminster
Helen Goldsbrough	The Adult and Community Learning Service
Katherine Hewlet	European Access Network
Jonathan Hughes	Dudley College
Lynn Hull	Learning and Skills Development Agency
Brenda Jackson	Staffordshire Learning and Skills Council
Kathryn James	NIACE
Pauline Lynn	Centre for Lifelong Learning
Lucia Marquart	The Adult College
Jocey Quinn	Institute for Access Studies
Emma Rankin	University of Central Lancashire
Judith Robinson	Staffordshire University
Kim Slack	Institute for Access Studies
Lorraine Snape	SPELL – Supporting People into Employment and Lifelong Learning
Jim Tate	Widening Participation South West
Liz Thomas	Institute for Access Studies
Wendy Tonge	Borough of Telford and Wrekin
Ikram Ulhaque	Race into Work – North Staffs Racial Equality Council
Katy Vigurs	Institute for Access Studies
Lynne Wealleans	Beth Johnson Foundation
Allison Williams	Careers Wales
John Williams	Workers' Educational Association

Appendix 5 – Directory of examples of brokerage

Adult Literacies Project
The project provides funds for many different locally based urban and rural group initiatives to foster literacy. In partnership with South Ayrshire Council, the University of Paisley will provide the training in research methods for the literacies officers of the council, evaluate the overall performance of the project and develop appropriate quality systems.
Ayrshire, Scotland
Hazel Knox, Director of Centre for Continuing Education
0141 848 3176
hazel.knox@mail.paisley.ac.uk

Fred Aldous Ltd
The project focuses on a small packing company with no history of formal training and very little in-house training. Although this was a very hard organisation to work in initially, through working closely with the business adviser a training needs analysis has been carried out and a training plan developed. Cost in terms of cash and time are real issues for the company. Free development programmes have been offered via an ESF, and the company was encouraged to use these to move individuals into training mode and see the benefits of becoming involved in learning.
Buxton
Catherine Tomlinson, Workforce Development Adviser
Catherine.Tomlinson@businesslinkderbyshire.co.uk

AMBER Project
Encourages and trains parents/carers to support and enjoy helping their own children to learn. Offers adult education choices 'on the doorstep' based in local schools and community venues. Trains Parent Support Workers (PSWs) to make the scheme work.
City of Nottingham
Brenda Thomas, Acting Project Manager
0115 910 4616
brenda.thomas@ncn.ac.uk

Basic Skills Project, Cambridgeshire and Peterborough Learning Partnership
A team of four development workers covering the county, working with employers, community and voluntary sector to 'match' needs with provisions.
Cambridge and Peterborough
Sue Besant, Basic Skills Development Worker
01813 811 745
Sbesant@mail.camre.ac.uk

Breakthrough and Building Bridges
The programmes work with referral agencies and individuals across the shire to promote education and training of adults with mental health issues. They aim to link the community, social and medical services and further educational opportunities so that individuals can progress to supported work, Access courses and other study.
Aberdeen and Aberdeenshire
Dr Deborah Simonton, Programme Manager
01224 272 447
d.l.simonton@abdn.ac.uk

Brent Community Network
A forum open to all voluntary organisations and community groups, developed from the need identified by these sectors to enable accountability and participation in the Brent Local Strategic Partnership. Informal training offered on current legislation, decision-making, capacity building, representing your community, making partnerships work and many more.
Brent, London
Jennie Doble, Brent Community Networker
020 8453 9775
brentcommnet@yahoo.co.uk

Broughton Community Resource Centre
Advice and mentoring for centre users, evaluations and surveys of community learning requirements and liaison with the learning providers to assess availability and feasibility.
Salford, Greater Manchester
Julie Pass, Centre Manager
0161 792 5980
julie.pass@salford.gov.uk

Business Link
Brokering links between the Learning and Skills Council and small businesses. Example: Amber Taxis expressed an interest in the Valuable Skills Employer Training pilot. It resulted in customer service training for the radio control staff, and a business administration course for the secretarial staff. A local college provider was used for distance learning with support from tutors.
Derbyshire
Jeff Spencer, Valuable Skills Adviser
01246 207 207 ext 2666
jeff.spencer@businesslinkderbyshire.co.uk

CATU (Ceramic and Allied Trades Union) Project
'Learning reps' are union reps and aim to get members back into learning. This can be at any level from basic skills to mainstream college. A variety of learning opportunities are available and learning reps signpost the members to suitable courses or training providers.
Stoke-on-Trent, Staffordshire
Paul Humphreys, CATU Resource Worker
01782 603 688   07786 113 920
phump1sc@stokecoll.ac.uk

Cedar Centre
Promotes the cooperative self-development of individuals and groups of all cultures and backgrounds. Training includes ESOL, literacy, photography, computing, sewing and craft. The aim is to build confidence and self-respect leading to improved social, educational and employment opportunities.
Isle of Dogs, East London
Helen Menezes, Director of Community Centre
helen@c-link.demon.co.uk

(Centre Point) - Camberwell Foyer
Vocational careers advice and guidance, employment and training elements, job preparation and interview techniques.
London
Jo Milne, Training Manager
020 7501 9677

Certificate in Higher Education: Music Production
A progression route into university for young people coming from the Community Music's crime prevention programme 'Break Beat'. Students, though disaffected from learning, are talented and motivated musicians. The course is sensitively run taking into account the interests and aspirations of the students, ability as opposed to academic qualifications and a tolerant and flexible attitude understanding the extreme nature of the learning curve.
London
Alison Tickell/Kate Page, Programme Manager

Chichester College
A large team of staff work across the college to facilitate entry to all *learners. Learning takes place on the college site and community centres.*
Chichester, West Sussex
Graham Vagg, Additional Support Coordinator
01243 786 321
graham.vagg@chichester.ac.uk

Churchyard Community Studies
A flexible, part-time programme based in the School of Social, Historical and Literary Studies. It is based on links that have been developed with key personnel from Portsmouth Diocese based in the cathedral. The diocese 'learning brokers' have been responsible for encouraging a flow of clerical and lay persons to enrol at different levels of study (Foundation Degree, Level 3 direct entry BA/MA). Students follow a programme of study which combines theological (taught by church staff) and social science inputs. A formal learning experience is offered which builds on informal and work-based learning in the church and community.
Portsmouth
David Carpenter, Programme Leader
David.carpenter@Port.ac.uk

City of Edinburgh Council, Department of Culture and Leisure, Museums and Arts Division
The aim of the service is to maximise the learning opportunities afforded by the display and study of the collections in the care of the department, and by the temporary exhibitions and related programmes and activities organised. Specific projects are targeted to specific groups (eg disabled people, older people) in line with council objectives. Learning takes place both in departmental venues and in the community.
Edinburgh
Sandra Marwick, Keeper of Education and Outreach Services
sandra.marwick@edinburgh.gov.uk

College Careers Team
Advisers offer individual appointments for career guidance for all members of the public, including a written action plan. Resource library with details of career information. Paper and computer based information available.
Stoke-on-Trent, Staffordshire
Jane Dunning, Careers Coordinator
01782 603514

Community Development
The community development adviser is a member of a broad range of community groups and forums in order to raise the aspirations and awareness of educational and lifelong learning opportunities and to act as a liaison and facilitator between the communities and learning providers.
Leeds and Bradford
Inder Hunjan, Community Development and Liaison Adviser
0113 283 2600 ext 3411
i.hunjan@lmu.ac.uk

Community Learning Advocates (CLAs)
The service employs six CLAs based geographically across the borough. Their remit is to engage with all adults within their area to help them articulate their learning requests. These are then grouped and projects are developed.
Doncaster, South Yorkshire
Ruth Brook, Adult and Community Learning Manager
01302 737 106
ruth.brook@doncaster.gov.uk

Community Learning Champions
Learning champions are local people living in particular geographic areas. They are usually committed lifelong learners themselves and they talk to local groups and individuals about what learning is wanted and needed in the area. They provide existing provision and generate interest in local 'first rung' learning delivered on the doorstep.
Calderdale, Yorkshire
Helen Ryan, Head of Adult and Community Learning
helen.ryan@calderdale.gov.uk

Community Learning Development Programme
Adult and community education covering four unitary authorities, five FE colleges and a number of voluntary sector and community sector organisations. Funded by an ESF bid.
Bristol and the rest of the UK
Marcus Beaumont, Community Engagement Manager
0117 372 6473
marcus.beaumont@lsc.gov.uk

Community Learning Team
Works in areas of high social depravation, encouraging local people who would not traditionally access education. Have three community learning centres, use local community centres and provide a community ICT project.
Telford, Shropshire
Wendy Tonge, Community Learning Officer
01952 202 059
wendytonge@wrekin.gov.uk

Community Literacy and Numeracy (CLAN)
A new initiative led by the Scottish Executive aiming to target 23% of the Scottish population who have literacy issues. A coordinator and two development workers make contact with local agencies and residents to raise awareness of literacies and to encourage individuals and groups to take up literacies learning. The project targets the following groups: unemployed, people with low skills, low paid, disadvantaged areas, ESOL, learning disabilities and those with limited or no qualifications.
West Dunbartonshire
Amanda Clark, Adult Literacies Coordinator
0141 952 3046

Community UK Online Project
Working with business, medical practices and other organisations in the community to act as host organisations and help embed learning in the community. State of the art computers with printer, scanner and internet access are provided in mobile lockable cabinets in places where people naturally congregate. It was designed to address social inclusion and neighbourhood renewal as well as addressing the 'digital divide'. The approach adopted was that of tapping into people's interests.
Thurrock, Essex
Maureen Wilcox, Manager, Thurrock Learning Partnership
01375 652918
mwilcox@thurrock.gov.uk

Creative Skills Consortium
Provides continuing professional development advice and guidance to practitioners in the creative industries. Via the Training Needs Analysis Programme, one-to-one guidance is given regarding their skills gaps, possible training opportunities (could be via mentoring, skills sharing etc, not necessarily through traditional training courses). Part funding (75%) is provided.
Truro, Cornwall
Jane Sutherland, Project Director
01872 273 344
janesutherland@creativeskills2.freeserve.co.uk

Delivering Basic Skills to the Homeless through the Medium of Creative Writing
Basic skills are delivered through creative writing courses to students attending the drop-in centre for the homeless. It caters for all ages of men and women. Each year a booklet of the writings by the students is professionally printed.
Central London
Paul Croft, Course Manager for Basic Skills
020 7641 8120
pcroft@waes.ac.uk

Department of Regeneration and Education
Provides a participative approach to learning brokering. Examples include Citizens Conference, Older People's Research Group, community planning toolkits, Learning Champions, UNISON Return to Learn.
Islington, London
Chris Jude
chris.jude@nhsu.org.uk

Education Coordinators – Women's Institute
Thirty-five volunteers based around the country who work with members of the Women's Institute (240,000 members) mainly in rural communities. The coordinators set up learning opportunities on demand and advise on all types of learning. Learning takes place at Denham College and in the community. The scheme has been in operation for over 80 years and is very well used.
National contact: Jennifer Adshead, Education and Training Director, NFWI
j.adshead@denman.org.uk

Educational taster sessions
The NHS Trust in partnership with the University of Paisley is launching a variety of educational taster sessions for all staff in accordance with the aims of the Learning Together Strategy for Education, Training and Lifelong Learning. Further guidance is then available for matching the identified interest/need to a local educational provision.
Ayrshire and Arran Acute Hospitals NHS Trust, Kilmarnock and Ayr, Scotland
Hazel Knox, Director of Centre for Continuing Education
0141 848 3176
hazel.knox@mail.paisley.ac.uk

Everybodyonline
The project works in deprived communities with local community groups to encourage community members to develop IT, internet and communication skills through technology.
Various locations throughout the UK
Catherine Maxwell, National Project Manager
01793 882800
Catherine@citizensonline.org.uk

Exploring Art History on the Net
A voluntary adult education provider with formal, academic, non-vocational courses through the general programme targeted at Community Education and Workplace programme.
Art History on the Net is a specific project.
Arsenal, London
Sandra Gaudan, Resource Centre Manager
020 7704 4209
sandragaudan@arsenalrz.org

Faith in London
Raising awareness of educational opportunities in faith communities.
Bethnal Green, London
Saif Ahmad, Chief Executive
020 8510 0440   0780 163 0077
saif@faithinlondon.org

Family Learning Support Worker and Link-up Supporter
Part of the Thanet Basic Skills Project, targeted at economically deprived wards in the area.
01843 583553
tbsp@lineone.net

Family Learning Works and Help-a-Mate
FLW is training family learning coordinators as learning brokers with low skilled parents in the workplace. Help-a-Mate is training 'helping people' to identify colleagues with basic skills support needs and signpost them towards help.
Coventry and Warwickshire
Sheila Grainger, Community and Learning Partnership Manager
01926 318 153
sgrainger@warkscol.ac.uk

Fashion Project
A pilot project is being set up targeting socially disadvantaged adults with some basic skills needs. The short project will engage 10 adults in a fashion project where they re-design some items of clothing to become 'new' and more fashionable. The aim is fun, feeling good about the outcomes and wanting more!
Barnsley, South Yorkshire
Esther Parnham, Learning Net Manager
eaparnham@btopenworld.com

First Group
Union learning representatives encourage bus drivers and depot staff to access learning opportunities in a learning centre in the bus depot – including shift work patterns and family learning at the weekends.
Essex
Carolyn Brooks, Workforce Development Manager
01245 550 094
carolyn.brooks@lsc.gov.uk

Food and Drink Net
The consortium plays a key role in research and brokerage relating to the training needs of the West Midlands, targeting the food and drink manufacturing industry. Services include finding appropriate courses, suitable training providers and taster courses.
Coventry University and West Midlands
Ruth Dolby, Food and Drink Net Manager
r.dolby@coventry.ac.uk

Gateway College
ESOL-IT courses (English language teaching and basic IT skills) for Asian factory workers. Run in association with KFAT and TUC unions.
Leicester
Michael Lynch, Course Tutor
0116 255 3079
mlynch@gateway.ac.uk

Go4 Advice About Learning and Work (IAG Partnership for Cornwall and Devon)
The Go4 network provides local information, advice and guidance for adults. The network is made up of agencies across Devon and Cornwall. Currently a project team is working with employers and trade union learning representatives to develop the workplace delivery of information and guidance on learning, through the provision of supported information access points on employers' premises.
Brian Farmer, Project Coordinator
0156 677 672 ext 244
brian.farmer@connexions-cd.org.uk

Greenisland and Rathcoole Library Learning Centres
A 2-year New Opportunities Fund project funded under their Community Access to Lifelong Learning Programme. The project aims to provide access to learning through ICT skills. These skills are taught together with essential skills (basic English and maths) classes. Users are encouraged to see the computer as a tool for furthering their everyday tasks (e-government) and hobbies. Basic ICT classes are offered which then progress to more difficult levels. 'Fun' classes such as 'Drawing with a computer' and 'Holidaying on the web' are also offered to encourage people to come into the centre and 'have a go'. The target group includes adults living in communities identified as socially deprived, older people, adults with low educational attainment, women returning to work, self-employed in small or medium sized enterprises, and the long-term unemployed.
Carrickfergus and Newtownabbey, Co Antrim
Kate McAllister, Lifelong Learning Development Officer
kate.mcallister@ni-libraries.net

Kent Guidance Consortium
A team of community learning advisers involved in capacity building and resourcing community and voluntary groups, identifying learning needs of the client groups and brokering courses to meet these needs. Learning takes place in locally accessible community locations.
Kent and Medway
Hugh Joshin
www.learntowork.org.uk

Kickstart Project
Project involving SMEs who wish to update the skills of their employees. Individual needs/training needs analyses are carried out. Learning opportunities made available include workshops in human resource management and IT skills and university modules. Funded opportunities available. Ongoing guidance provided.
Paisley, Scotland
Hazel Knox, Director of Centre for Continuing Education
0141 848 3176
hazel.knox@mail.paisley.ac.uk

Kids Company
Work therapeutically with vulnerable children and young people including counselling, support and training.
London
Anne Forde, Care Coordinator
020 7703 1808

Kingspan Industrial Insulation
Work currently focuses on brokering Level 2 qualifications to a manufacturing organisation based in a predominately rural community with limited transport links to large towns or cities. The aim of the project, which has just begun, is to implement an enhanced health and safety and quality programme. The scheme targets employees with below Level 2 qualifications and learning takes place in the workplace.
Glossop, Derbyshire
Lucie Andrews, Learning Broker
luciea@derbyshire.org

Ladder Project (The)
The Project (1997–2002) used unemployed, unqualified young adults to carry out outreach work with disadvantaged young adults, while at the same time training the project workers up to diploma or degree level with experience. The target group was 16–25 year olds not in education, training or employment and the aim engaging and handholding them with the aim of them fully rejoining society.
South Wales Valleys
Pat Dunmore
01873 850 975
pat.dunmore@btconnect.com

Lambeth Walk Day Centre
Activity, training and employment programmes for homeless people.
Lambeth, London
Julia King, Centre Manager
020 7735 9012

Lancashire Compact FE and adult mentoring schemes
The aim of the project is to work with individuals who are first-generation entrants into higher education, either from disadvantaged areas or areas with traditionally low rates of participation in higher education. Individuals are mentored by undergraduate students and the learning is informal yet semi-structured and can incorporate personal, social, academic and vocational work depending on individual needs.
Lancashire
Neil Barlow and Nadine Baxter-Smallwood, Lancashire Compact Project Officers
01695 584 869
barlown@edgehill.ac.uk
01524 384 513
n.baxter-smallwood@ucsm.ac.uk

Laptop Mobile Provision
Provide ICT taster sessions for the community in local venues to attract learners in to follow up basic skills and ICT courses. Target areas include parents, people in sheltered accommodation and social groups.
Weymouth and area
Carolyn Lawson, Laptop Coordinator
01305 204 802
carolyn.lawson@weymouth.ac.uk

Learning Ambassadors
The project pays/supports/trains local women, recently engaged in learning themselves, to enthuse, encourage and inform others in their own community about learning. Targets the local adult community who have little or no experience of education in the formal sense.
Bromsgrove, Worcestershire
Julia Dinsdale, Widening Participation Project Worker
01905 855 554

Learning Bus (The)
A double-decker bus equipped with IT equipment and a tutor visits Metroline garages to provide staff with on-site learning and advice. Future plans are to involve the local community.
Metroline Garages, North West London
Alan Kelley, Learning Rep
020 8361 1692
esoteric_ak@softhome.net

Learning Links (Portsmouth) Ltd
As part of the project, learning champions gain an OCN-accredited qualification and then go out into the community and encourage others into learning. Learning takes place in community centres and pub rooms as well as in schools and colleges.
Hampshire and the Isle of Wight
Janet de Bathe, Chief Executive
02392 296 460
jdb@learninglinks.co.uk

Learning on Prescription
Aims to encourage people to engage in learning in order to improve their personal health and well-being. Clients are referred to a learning adviser by a health professional, initial meetings taking place either in the client's home or at the medical practice. The learning adviser then develops an action plan suited to the individual's learning needs. The scheme targets people with mild to moderate mental health problems, and those who are isolated or belong to vulnerable groups such as lone parents and clients with disabilities.
Wendy Tonge, Community Learning Manager
01952 202 059
Jo Robbins, Health Partnership Manager
01902 323 950

Learning Partnership
To engage with employers to further the training and education of their employees through basic skills. The training need is identified and then matched to a suitable college for delivery. Training usually meets a specific business need with basic skills as a support mechanism.
Leicestershire
Simon Lincoln, Basic Skills Learning Broker

Literacy Development Workers/Shared Beginnings Development Workers
LDWs work individually with hard to reach learners and develop the basic skills of the young person as well as self-esteem and confidence. Progression routes can then be identified. SBDWs work with groups of parents and carers of children aged 0–4. A 10-week programme aims to increase self-confidence and a celebratory finale introduces further opportunities in the local community.
Newcastle-upon-Tyne
Avril Gibson, Project Development Worker
0191 260 5200
newcastleliteracytrust@btinternet.com

London Arts Learning Partnership
LALP is a brokering agency that links hard to reach learners in community settings to post-16 education providers through the arts. At the heart of the brokering is a core group of arts organisations, each committed to developing its education programmes in/through the arts.
London
Adrian Chappell, Programme Manager
0790 500 8902
ac@artseducation.freeserve.co.uk or LALP03@hotmail.com

Mentoring in the Workplace
The project has a number of European partners: France, Germany, Greece, Lithuania, Spain and the UK. The 2-year project, which incorporates a research element, aims to develop the role of the learning mentor to offer peer support for employees undertaking basic skills learning in the workplace. This includes the development, piloting and evaluation of a training curriculum and training materials for employees who wish to take on the role of learning mentor. Online learning materials currently available for those supporting workplace basic skills will also be evaluated.
Lucia Marquart, Project Worker
01524 581227
Lucia.Marquart@ed.lacscc.gov.uk

Millwall Football Club
London
Jaque Morley, Study Support Centre Manager
020 7394 8691
sscmillwall@yahoo.co.uk

Moving On with Learning (MOWL)
MOWL is based at the University of Liverpool and provides learning opportunities to adults denied a basic formal education as a mechanism to address the institutionalisation that is the experience of our potential learners. The project aims to provide a respect-based learning environment which supports students to achieve their next desired steps, accessing mainstream educational, social and employment opportunities while being valued as active members of their community. MOWL works with students, at their own pace, to identify and achieve progression routes. The scheme targets adults who are usually long-term full-time users of day service provision. Many will have experienced special school provision and have achieved few or no educational qualifications. MOWL itself provides learning opportunities, but also works with Liverpool Community College, Breakthrough UK, and the Adult and Community Learning Service to establish progression routes for learners.
Liverpool
Ann Wade, Development Coordinator
annwade@liv.ac.uk

Neighbourhood Learning Net
To increase participation in learning among local adults by developing a neighbourhood plan and working proactively in the local community to engage new learners and linking learners to existing and new learning opportunities available in the local area and beyond.
Mapplewell and Staincross, Barnsley, South Yorkshire
01226 381119
learningnet@uvp1.fsnet.co.uk

North West London Learning Partnership
Community groups and FE institutions come together to deliver learning to groups 'on their terms, on their turf'. Examples include running a course for disaffected young black males (16–25) using raga music as a basis for literacy, working with the over-60s to improve financial literacy through online shopping etc, and working with traveller families. Women have searched the net for travel and fashion and to help improve their health awareness. Men have helped with desktop publishing to produce invoices and quotes, sometimes using laptops that are taken out to local pubs.
Brent and Harrow, Greater London
Vicki Wusche, Partnership Manager
020 8208 5476
Vicki.Wusche@cnwl.ac.uk

Outreach Development Workers
The project works with disadvantaged communities across the borough. funded by the Single Regeneration Budget and the New Opportunities Fund. The Digital Multimedia Project brings hi-tech equipment to deprived communities and produces videos. The Women's Project identifies how to improve skills and encourage learning, both formally and informally.
Stockton-on-Tees
John Harris, Principal Adult Education Officer
01642 393 505
john.harris@stockton.gov.uk

Outreach Provision
Offers educational courses (from crystal healing to motor vehicle maintenance) for both males and females excluded by gender, location, ethnicity, age or any reason. 'Taster' days held in various community centres with follow-on courses.
Middlesbrough, Teesside
Dr Pauline Lynn, Facilitator
01642 384 268
p.e.lynn@tees.ac.uk

Polestar Digital
Individual needs analysis carried out at people's workstations, which has led to paid college release for basic skills courses, plus maths and English courses on site. Some other paid release has also been negotiated. Joint union and management project.
Annesley, Nottinghamshire
Sara Townsend

Reachout – Flexible Routes to Higher Education
Provides community-based, sustained advice, support and educational guidance to people wishing to progress educationally but who lack access to clear information and guidance locally.
Newtown, Birmingham
Dr Marion Bowl, Project Manager
0121 414 8055   0121 212 9624
M.bowl.1@bham.ac.uk

Refugee Assessment and Guidance Unit
The RAGU was set up in 1995 and believes that refugees have a wide range of skills and experiences that represent a valuable but under-used resource. The range of services is focused on identifying individual strengths and abilities and providing support towards achieving realistic and relevant educational and employment goals. Advice, guidance and support into employment are offered. Training courses and workshops are run to enhance language skills and build confidence.
Inner City (London)
Andrew Clarke, Teaching and Learning Coordinator
020 7133 2344
andrew.clarke@londonmet.ac.uk

Relearn Rosyth
Practical help and advice provided by learner representatives, Amicus Union. Based at Babcock Lauder Training (an HE college), and funded by Scottish Union Learning Fund and Babcock BES.
Rosyth, Fife, Scotland
Raymond Duguid, Coordinator
01383 412 131
Raymond.Duguid@babcockbes.co.uk

Route to Skills
Lifelong Learning Roadshows are held in the workplace to encourage otherwise excluded employees to access learning opportunities. Basic skills and ESOL training courses can be provided and funded. Quality Support Services to the small business community of Harrow.
Harrow and all of West London
Duncan Lamb, External Programmes Manager/Project Manager
020 8427 6188
duncan.lamb@hib.org.uk

St Mungo's, Lambeth North Day Centre
Activity, training and employment programme for homeless people. Art class and workshop. Pilot scheme: homeless people involved in practical activities through learning woodwork skills.
Lambeth, London
Carol Mercer, Acting Manager
020 7261 9622
carolm@mungos.org

Sandwell Learning Champions Project
Learning champions are drawn from the local community to work in the community to help people, especially hard to reach groups, engage in learning which is informal, vocational and leisure based.
Sandwell, West Midlands
Judith Massey, Manager
0121 569 2336
judith_massey@sandwell.gov.uk

Somerset and Dorset Manufacturing Network
The aim of the network is to provide opportunities to resolve technological, management and skills issues affecting quality, cost and delivery. Training is delivered through a variety of sources and funding can be sourced.
Yeovil, Somerset
Fred Turner, Network Manager
01935 845361
FredT@yeovil_college.ac.uk

Southwark Youth Services
Out of school learning opportunities for young people not in the education system.
Southwark, London
Karl Murray, Youth Service Manager
020 7525 1530
karl.murray@southwark.gov.uk

SPELL (Supporting People into Employment and Lifelong Learning)
Working in a designated regeneration area SPELL has recruitment and support workers visiting the community and encouraging them to identify their learning, training and employment needs. Funding is available. Non-vocational activities are also offered to ease clients back into the learning process. Clients are supported both in basic skills and via in-class support.
North East Sheffield, South Yorkshire
Lorraine Snape, Operations Manager
0114 249 8100
lorraine@spelldirect.org

Student Tutors (SiS)
Provides student tutors to work in schools, colleges, adult/community education covering a wide range of courses. Also provides courses including preparation for college and university.
Tyneside and Northumberland
Jim Wood, Manager
jim.wood@ncl.ac.uk

Suffolk Skills for Life
Offers support to providers in Suffolk though Suffolk Skills for Life by liaising with employees for basic skills provision offered by providers.
Ipswich, Suffolk
Simon Allsop, Business Service Adviser
01473 883 022
simon.allsop@isc.gov.uk

Talent Spotter Project
A young outreach project worker works in the community to engage with 16–19 year olds who failed to engage with post-16 education, or who dropped out. There is a base where the youngsters can meet, a type of youth café/cyber café. Free advice, guidance and refreshments are available in a warm, friendly and non-threatening environment.
Lydney, Forest of Dean
Fiona Gallimore, Project Coordinator
01594 838 482
fiona_g@rfdc.ac.uk

Tameside Lifelong Learning Partnership Skills Brokerage
Basic skills brokers in operation across the borough working with employers, identifying needs of employers and meeting the need with in-house or in-fill provision from approved providers. Brokers work with community, voluntary groups, Jobcentre Plus, the Probation Service, Groundwork etc, to secure 'tailor-made' learning opportunities that reflect non-traditional, flexible programmes delivered in community venues. Additional short-term funding has been secured to recruit 'Skills Broker' working in Single Regeneration Budget areas to extend and develop the community provision.
Tameside, Greater Manchester
Denise Bevington
0161 343 4461
basic.skills@mail.tameside.gov.uk

Think Uni (www.thinkuni.info**)**
A website to provide practical information for school and college learners considering the move from further to higher education about support and coping with academic life in a university. Also provides ready-made presentations for downloading which college staff can then deliver. An interactive site which enables potential learners to self-assess such issues as their financial situation, study skills competence, need for disability support etc and to download information.
Website
Mark Ellerby, Welfare Services Manager
0121 331 6513
mark.ellerby@uce.ac.uk

Training Advisory Group (TAG)
Offers a professional, impartial service of advice and help to any individual and/or business on all training and development matters.
Barnstaple and Bideford, North Devon
Ken Calvert or Sylvia Hindley, Directors/Advisers
01237 476606   01271 831217
info@trainingadvisorygroup.co.uk

UNISON
Brokering opportunities for health services employees to progress to further and higher education through work-based opportunities.
Steve Williams, Head of Education
020 7551 1675
s.williams@unison.co.uk

Union Learning Representatives
The union learning representative's main task is to encourage union members to get back into learning. This can be work-related or for their own personal achievement in any subject. The target group are Public and Commercial Services Union members in the Ministry of Defence in Devon and Cornwall (more recently extended to the south-west of England).
Plymouth and Cornwall
P. Staddon, Union Learning Representative
staddonp@a.dii.mod.uk

UWIC Widening Participation, Outreach Access Course
The course comprises study skills modules and pathways linked to areas of study at degree level. The Access course is for people aged over 21 and is a free evening course. The project is aimed at a specific community with a high number of ethnic minority groups. The course is delivered on an outreach basis before students attend the open day at the university.
Cardiff, Wales
Kay Howells, Widening Participation Officer
02920 416 288
khowells@uwic.ac.uk

Valuing Experience – Learning Advisers
The learning advisers work with members of their local communities to help them identify relevant OCN units, and encourage them to put together a portfolio of evidence based on their experiences as paid/unpaid workers mostly in community/voluntary settings. The evidence demonstrates learning from those experiences. Learning advisers are themselves trained through the project and are awarded an OCN credit at Level 3 or 2 on completion of a portfolio. Groups participating have included disabled people, people whose first language is not English, parents of young children and people involved in community regeneration projects.
Derbyshire
Alison Ledbury, Project Coordinator
a.j.ledbury@derby.ac.uk

West London Learning Partnership, Basic Skills in the Workplace Programme
Offer basic skills delivery in the workplace. Each employee receives an information and advice session. Particularly target health and social care, hospitality and leisure and the retail sectors. Also hold employer events to attract employers onto the ESF-funded programme.
West London
Lorraine Collins, Manager of WLLP
020 8825 9356
lcollins@ealing.gov.uk

West Sussex Learning Partnership
The West Sussex Learning Partnership is an inclusive partnership set up to ensure that high quality learning opportunities are available for individuals throughout the whole of their lives. The core partners are the LEA and its schools, FE colleges, the Careers Company, and the Sussex Learning and Skills Council. The partnership has developed an integrated network of providers to meet the identified needs of individuals, employers and local communities. Its eight networks are provided by data sets on current provision and participation. The networks identify underachieving groups and individuals and meet their needs through collaborative action.
Chichester, West Sussex
Maggie Nairn, Facilitator
maggie.nairn@westsussex.gov.uk

Westminster Community Partnerships
Westminster, London
Neil Ritchie, Work-Related Learning Coordinator
07867 793 108
N.Ritchie@westminster.gov.uk

Widening Participation in the Black Country: Right Track Programme
The learning advisers are the first point of contact for potential students in the community, and direct them on to Right Track or to a more appropriate course or source of advice. Have one-to-one contact with students by phone or in person and give encouragement and motivational support. Also advise on practical help and support such as childcare, finance etc.
Dudley, Sandwell, Walsall and Wolverhampton
Vicky Parker, Project Officer
01902 322 384
V.Parker@wlv.ac.uk

Winter Programme – Preparation for Learning
Partnership between further and higher education to provide a bridge to learning at HE level. Provides access to the development of skills, using a variety of teaching methods, for the academic environment and workplace. The programme aims to support aspirations and attainment for the most disadvantaged learners.
London
Katherine Hewlett, Facilitator, or Jeanne Godfrey, Course Delivery
020 7911 5764
hewletk@wmin.ac.uk or godfrej@wmin.ac.uk