



ALLUME

Tools and Results



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ALLUME: Pathways and Policies – Recommendations.

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APL	Accreditation of Prior Learning
BeFlex	“Benchmarking Flexibility in University lifelong learning in the Bologna Process”, project coordinated by EUCEN
BeFlex Plus	“Progress on Flexibility in the Bologna Reforms”, project coordinated by EUCEN
EQF	European Qualifications Framework
EU	European Union
EUA	European University Association
EUCEN	European University Continuing Education Network
HE	Higher education
HEI	Higher education institution
LLL	Lifelong Learning
LLLU	Lifelong Learning University
OECD	Organisation for Economic Co-operation and Development
RPL	Recognising/ Recognition of Prior Learning
SIRUS	“Shaping Inclusive and Responsive University Strategies”, project coordinated by EUA
ULLL	University Lifelong Learning
UNESCO	United Nations Educational, Scientific and Cultural Organisation
VET	Vocational Education and Training
VNFIL	Validation of Non-formal and Informal Learning
VPL	Validation of Prior Learning
ZWL	Zentrum für Lehre und Weiterbildung; LLL unit at the University of Stuttgart

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1

Introduction

The ALLUME project produced three main reports:

- An Executive Summary
- Publication: Pathways and Policies – Recommendations
- Publication: Tools and Results

This publication (*Pathways and Policies – Recommendations*) is intended for senior managers of universities, vice-rectors as well as regional national and European public authorities. After introducing briefly the project's main aims and methodologies, it presents the main results of ALLUME and gives recommendations for the creation of LLL strategies to achieve Lifelong Learning Universities.

It is accompanied by two additional documents:

The publication *Tools and Results* contains the technical results of the ALLUME project and targets practitioners and staff involved in the actual strategy creation processes on the ground. It comprises the three tools developed by the ALLUME project which will assist universities in the development of concrete ULLL strategies and actions by helping them to work on the process and the content of their LLL strategies through reviewing and extending their current LLL approaches.

The *Executive Summary* provides a concise overview about the main methodologies, products and recommendations of the project.

All documents are available for download under <http://allume.eucen.eu/documents>

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Project description

1. ALLUME – From “A Lifelong Learning University Model for Europe” to “Pathways for Lifelong Learning Universities”

In view of the importance of Lifelong Learning (LLL) as the backbone of the European Education and Training Strategy and the contrasting low commitment to LLL by universities, the main objective of the ALLUME project was to explore ways to increase the participation of universities in Lifelong Learning and to produce “A Lifelong Learning University Model for Europe”. This model was supposed to assist universities by providing guidelines based on the European Universities’ Charter on Lifelong Learning published in 2008. However, during the project’s lifespan it became clear that the idea of a unique model, guidelines and a one-size-fits-all approach were outdated and not adequate given the diversity of universities, environments and the heterogeneity of LLL strategies and processes.

While the challenge of making the Charter and of making Lifelong Learning Universities (LLUs) a reality remains, the initial concept did not seem to match current circumstances. As a result, the project evolved from the aim of elaborating “A Lifelong Learning Model for Europe”, to the vision of developing flexible “Pathways for Lifelong Learning Universities”. Thus, the objective of ALLUME became to provide practitioners and (vice) rectors involved in LLL with a set of reflexive and inspiring tools that could help their teams to define and implement concrete actions to make the 10 commitments of the Charter a reality. ALLUME intended to contribute to this implementation process on the basis of best practices at work in universities having already built and integrated successful LLL strategies.

2. Approach

The project design of ALLUME combined research and assessment activities in the context of organisational development, with awareness-raising initiatives at different policy levels. This approach led to the proposition of policy recommendations for LLL practitioners and rectors and tools which were introduced to decision-makers in universities and promoted through key European networks in Higher Education.

The project’s methodology can be divided into the following areas:

1. Production of consortium case studies following a three-step methodology:
 - Step 1: Institutional analysis and first case study report
 - Step 2: Visits to the case study institutions and visit reports
 - Step 3: The final case study reports on the basis of the visitors’ recommendations and remarks.

2. Analysis of the case study results and design of draft supporting tools
3. Testing visits in the form of on-site visits in six universities in European member states not yet considering LLL as a priority

While working on the case studies and carrying out the testing visits, the diversity of the different strategies to implement a LLL University was highlighted and led to a questioning of the usability of the concept of a single set of guidelines, which would not be adequate for today's diversity and flexibility of processes. Thus, the approach passed from producing guidelines for universities to the concept of designing **flexible tools** which will help universities start and support a LLLU strategy process respecting a wide range of identified frameworks.

4. Discussion of the preliminary tools and results at the final event "Pathways for Lifelong Learning Universities?" in Barcelona in September 2011 with European organisations, institutions and networks

3. Products

- 10 case studies presenting progress in the implementation of LLL strategies in line with the 10 commitments of the Charter
- The 10 case studies presented in a analytical grid
- Transversal Analysis of the Consortium Case Studies focusing on the content
- Transversal Analysis of the Consortium Case Studies focusing on the process
- Draft supporting tools for the testing phase in universities based in countries not yet considering LLL as a priority
- The universities' and evaluators' reports resulting from this testing phase, and a transversal reading
- 4 discussion seminars in Lille (FR), Malta (MT), Amsterdam (NL) and Barcelona (ES)
- 3 flexible tools
- A highly effective proven methodology including structured peer visits
- Two publications containing the final products and methodologies
 - Pathways and Policies – Recommendations
 - Tools and Results
- One executive summary

4. Strengths of the project

- Constant interaction with LLL stakeholders and decision-makers at European level through consultation seminars and the testing process
- Strong evidence of awareness-rising among end-users
- High adaption to end-users' needs of the final tools
- Highly positive feedback from the testing institutions about the set-up of the visits
- Confirmation of identified needs
- Visibility of impact of the project's results and supportive character of the developed tools
 - Inclusion of LLL as one of the fundamental principles of action in the draft of the West University of Timisoara's Charter
 - Embedding of University Lifelong Learning (ULLL) in the Zentrum für Lehre und Weiterbildung (ZWL) in the University of Stuttgart
 - Design of concrete ULLL strategies in the University of Stuttgart
- High impact on the partner institutions who guided the visits as independent experts
 - Mutual exchange of different LLL approaches and concepts
 - Additional learning experience
 - Highly valued benefits for both hosts and visitors

"The process of evaluation was extremely important for our institution. We discovered that we are actually better than we thought. We were able to isolate the weak points in our system and we are going to improve them. The cooperation in the international levels gives institutions new perspective and changes the paradigms for problem solving [sic]." (Feedback from one of the testing institutions)

Project Partners

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University of Sciences and Technologies of Lille 1 (FR)
University of Gent (BE)
Catholic University of Louvain (BE)
University of Tartu (EE)
University of Brest (FR)
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University of Zilina (SK)
University of Bolzano (IT)
University of Maribor (SI)
West University of Timișoara (RO)

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Tools for Self-Analysis and Benchmarking

Why Do we Need Tools for Self-analysis and Benchmarking?

Many universities are determined to become Lifelong Learning Universities. Some have travelled further than others, and have developed important areas of Lifelong Learning expertise. Others decided to stay with their existing student base and minimise participating in Lifelong Learning for the moment. The purpose of these tools is to share the experiences of European universities. It would be a waste of resources to have everyone start from scratch when knowledge and experience are available for everyone to use if they wish.

Thus, these three tools gather the knowledge about LLL strategies in place at different middle-sized European universities and, following the analysis of their strategies, present mechanisms which are supposed to facilitate the strategy developing process of other Higher Education Institutions (HEIs). These tools were developed based on good practices at work in the area of LLL (strategies) in ten universities from eight different European member states and on the insights and suggestions for improvement obtained in six testing visits in institutions with less advanced LLL strategies.

The majority of the six testing universities welcomed the idea and the set-up of the testing visits and considered the tools as interesting. Thus, the validation of the tools in the testing process showed that they are useful for supporting universities having already started to develop LLL processes and that they can have an impact.

Following up the results and impact of the testing some months after the visits took place, the supportive character of the process and of the guidelines became visible. Three testing institutions confirmed that they supported institutional efforts to speed up discussions on LLL and to move LLL closer to the forefront of their university's concerns. Some good illustrations for the impact of the tools and of the testing visits are the inclusion of LLL as one of the fundamental principles for the activity of the university in the draft of the West University of Timisoara's Charter, the embedding of University Lifelong Learning (ULLL) in the vision of the Zentrum für Lehre und Weiterbildung (ZWL) and the design of concrete ULLL strategies in the University of Stuttgart.

Objectives of the tools

The tools intend to be reflexive in nature and to provide support to universities and other actors in the field of learning at academic level (EQF level 6 – level 8), such as policy makers, research institutes, commercial enterprises offering learning opportunities, representatives of labour unions, representing the individuals.

They serve as a reflexive document for the development of a Lifelong Learning culture within universities and for the design of a Lifelong Learning strategy adapted to specific needs of each university. They also help institutions on the way to a practical implementation of Lifelong Learning, by inviting universities and other LLL-actors to formulate concrete action plans, largely connected to (for example):

- curriculum development, enhancing guidance and counselling
- renewal of the student recruitment strategy, reaching for new audiences
- construction of a quality system or launching a quality charter (e.g., learning achievement, graduation rates, relevance for employment, Recognition of Prior Learning)
- going through an institutional, field-specific or thematic evaluation
- designing the corporate governance of the social interaction of the university
- planning of staff development activities, both to foster Lifelong Learning as well as for their own Lifelong Learning
- Institutional relations (e.g., partnerships, networks, resource sharing, problem-solving assistance)

Structure of the tools

The ALLUME project developed three distinct tools:

1. Tool for Self-Analysis (Process)

This tool works with the Strategy-as-Practice approach developed by Whittington and invites universities to analyse in detail their way of doing strategies. In this way, it helps to identify key (internal and external) actors involved in the strategizing process and facilitates identifying the single steps undertaken in making a strategy. This tool has a strong internal organisation focus.

2. Tool for Self-Analysis (Content)

This tool assists universities in getting a strategic overview about their current LLL-strategy, mission, vision and goals. Furthermore, it invites institutions to select three key priorities for the next years and to work in detail on them, leading to a revision of the current LLL-strategy and the formulation of an action plan.

3. Tool for Benchmarking against the European Universities' Charter on LLL

This tool invites HEIs to benchmark their performance against the 10 institutional commitments of the European Universities' Charter on LLL. Universities will receive suggestions of further areas for improvement. It might be a good idea to use this tool in combination with the Tool for Self-Analysis (Content) in view of selecting key priorities for the future.

How to use the Tools?

In the following, some advice on how to work with the three tools, which is partly taken from experience of the working process of the testing visits, will be presented.

The task the project has taken up is to support the transformation of universities with Lifelong Learning activities into fundamental Lifelong Learning Institutions. Since this transformation cannot be fulfilled without a clear strategic process and documentation at the institutional level, the basic approach of the ALLUME project is a strategic one. However, it may not always be helpful and supportive to start with an unguided transformation right away. The attempt to reach a sharp strategic profile may even be disadvantageous for the Lifelong Learning ambitions when started before the University's present position is explored and requirements in the institution and its context are sufficiently met.

As a result, universities have to know when they are ready to develop and improve their LLL strategies and when they want to dedicate time to do this task as it is a work-intensive process. The time dedicated to the development of a strategy has to be seen in terms of benefits derived from an overarching strategic framework.

This means that there are other paths to follow. To give some examples:

- One possibility is to launch a strategic pilot project in a faculty or institution, where the conditions are most suitable. This could be a faculty with strong professional links (e.g. medicine, teacher training or business school) or an institution with a sharp profile in interaction with society (e.g. language centre, a high tech institution or an institution with strong links to the third sector).
- Another approach is to gradually widen the service with the relevant units of the university. Making the academic community acquainted with the activity will offer a chance to see the practical benefits for the research and teaching tasks of the university as well as the obvious role in interaction with society.
- Some universities might see capacity development as the way to go forward. It is a challenge for all universities to produce high-quality services for new groups of students. Following lifelong learning principles in the curriculum development, pedagogical training or technical support for blended learning may be the natural way to go forward. In this case, the promotion of lifelong learning can also take place with “dimmed lights”.

Consequently, different ways of “doing strategy” and “implementing” are possible: top-down, bottom-up, middle-in then up-down (a local pilot followed by global dissemination), clustering (pilots in parallel), and so on. Choose your own.

It is also beneficial to be flexible during the working process with the tools, which might mean changing plans in a constructive way if it becomes, for example, apparent that more attention is needed in specific areas. It might also be useful to adjust the tools to university-specific needs and to concentrate only on some sections of the tools and to work in detail on those, rather than to work on the whole set. This might, for instance, mean working more in detail on the benefits and problems of the three LLL-priorities identified, which is done from a more general perspective in the tools. A SWOT analysis might be developed for these three and could be used for deriving concrete actions and tasks.

Even though such an exercise would be organised independently, it is important to use its outcomes in the further development of the university activities. This is in line with the basic idea of Lifelong Learning as an embedded and essential feature of the whole institution. This document invites you to work collaboratively taking care of involvement of stakeholders. The testing process also showed that the involvement of other experts in the area of LLL can be very beneficial when working with these tools.

Although the support of the faculty and university leadership is crucial for integrating LLL into the global university's vision, it might be better to involve them at a later stage when there is already clarity about the direction and LLL-priorities.

Finally, it should be remembered that working with the tools requires sound preparation. The documents should be distributed and read by participants before the sessions and there should be some prior reflection about which people to involve in this process.

Tool for Self-analysis (Process)

Background information

This exercise is based on the strategizing approach developed by Whittington and applies a practice perspective, which starts from located practical actions on-site in companies and other organisations with the objective of investigating the process of creating strategies. In this sense, **strategy** is considered as a **process done by people** in concrete and formal actions like team meetings, presentations and workshops. It is in line with a broader "practice paradigm" in social science theory since the 1980s, focusing more on "**people** than on organisations, the **routine** as opposed to change, and **situated activity** rather than abstract processes [emphasis added]" (Whittington, 2003, p. 118).

Concentrating on the formal work of strategic and organisation design, Whittington developed a set of six questions:

1. "How and where is strategizing and organizing work actually done?" (Whittington, 2003, p. 119)
2. "Who does the formal work of strategizing and organizing and how do they get to do it?" (Whittington, 2003, p. 120)
3. "What are the skills required for strategizing and organizing work and how are they acquired?" (Whittington, 2003, p. 120)
4. "What are the common tools and techniques of strategizing and organizing and how are these used in practice?" (Whittington, 2003, p. 120)
5. "How is the work of strategizing and organizing organised itself?" (Whittington, 2003, p. 121)
6. "How are the products of strategizing and organizing communicated and consumed?" (Whittington, 2003, p. 121)

These six questions were partly modified and adapted to the analysis of the ALLUME consortium case studies, focusing on an institutional perspective¹:

1. Why does the process of strategizing begin? What are the external/internal drivers of change?
2. Who does the formal work of strategizing? Who are the internal actors? What are their roles: Are they doers, influential persons, researchers, decision makers?
3. How is the process of strategizing done?
 - a. What is the process' characterisation? Formal or informal?
 - b. What level of development? Described in 4 steps: analysis, design, implementation, evaluation
4. What are the tools and techniques used for strategizing?
5. How are the products of strategizing communicated?

How to use this tool?

Although primarily intended for investigating common patterns and clarifications in universities' LLL-strategizing processes in the ALLUME context, this approach and the developed set of questions also allow a hands-on approach for institutions to define or revise their LLL-strategy process. The objective of this exercise is to analyse the way of doing things, that is to say the process of LLL-strategizing: The focus is on how it is done or how it has been done it and not on the content of the LLL strategy.

This exercise will thus give you a systematic overview of your LLL strategizing process, the actors involved and tools used.

Through a better understanding of your LLL strategizing processes, you will not only be able to improve the process (for instance by taking into account the different drivers, by involving all stakeholders) but also to improve the results of your LLL strategizing (for instance ameliorating or strengthening these results because of the focus on strategizing).

In this exercise, you are invited to answer 5 main questions. The questions are detailed and refined by the use of some sub-questions or some pre-defined answer categories.

Your results can be compared to the patterns analysed for the ALLUME case studies and will thus allow you to conduct a revision and process optimization adapted to your own needs and institutional context.

Further information:

Whittington, R. (2003) 'The work of strategizing and organizing: for a practice perspective', *Strategic Organization*, 1 (1), pp. 117-125

¹ e.g. leaving out question 3 and omitting the consumption aspect of question 6, regrouping of questions and adding the motivation or reason for starting strategizing

Strategizing key questions			
Question	Category	Sub-Category	Strategizing in your institution
Why is there a need in developing a LLL strategy in your university? Why do you have to start a LLL strategizing process?	What are the external drivers of change?		
	What are the internal drivers of change?		
Who are (or should be) the internal or external actors involved in the LLL strategizing process? Who does the formal work of strategizing?	Who are the internal actors? What are their roles?	4 different roles have been identified: - Do-ers - Influential persons/ sponsors/ researchers Decision makers	
	Who are the external actors? What are their roles?	4 different roles have been identified: - Do-ers - Influential persons/ sponsors - Researchers - Decision makers	
How is the process of strategizing done in your university?	What is its characterization? Is the strategizing process in your university formal or informal?, formally or informally organised?	Formal or Informal	
		Step 1) Analysis	
		Step 2) Design	
		Step 3) Implementation	
		Step 4) Evaluation	
What are the tools and techniques used (or planned to be used) in your university for strategizing?	Which tools are used?	For example, the use of organisation charts, cost models, strategic plans, IT tools, quality procedures, etc	
	Which methods are used?	For example, the use of Incentives, a multi-field approach, a triangle approach, the collection of data, research indicators, etc.	
How are the products/results of your LLL strategizing communicated?	Where are the products communicated?	Internally?	
		Externally?	
	How are they communicated?	Internally?	
		Externally?	

² Please see the section Strategizing Process in your institution for a more detailed table on this question.

Strategizing process in the institution

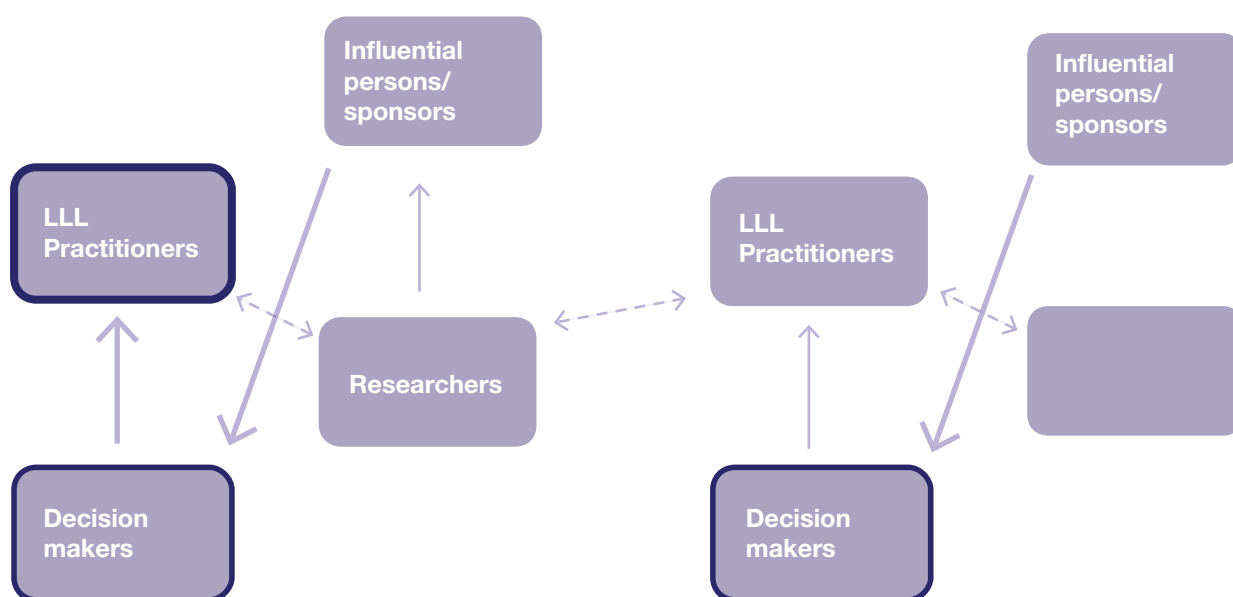
Who is involved in the strategizing process of your institutions? Please describe the position and the role of the people involved in this process.

PERSONS INVOLVED IN THE STRATEGIZING PROCESS		
NAME	POSITION	ROLE

Which persons are involved in which decision processes?
If you can, please classify them according to their influence on the strategizing process?

PERSONS INVOLVED IN THE STRATEGIZING PROCESS			
NAME	POSITION	ROLE	Ranking

For this section, a visualisation may help to clarify the decision making and communication processes. Therefore, you are invited to map the current processes in your institution using a similar sociogram like the one below (you can indicate the importance and influence of some actors and communication processes by using, for example, stronger frames. The terms used in the sociogram should be replaced by the functions of persons in your institution).



In the sociogram above a situation of top-down steered development has been described. Where researchers inform influential persons and/or sponsors, who in turn advise/steer decision makers and where the decision makers steer the LLL practitioners.

In (most) other cases motivated and interested LLL practitioners take action by, for example, participating in national and international development programmes and by implementing Lifelong Learning practices. The development is bottom up and needs-driven and steered by the developments in the market (demand, cost/benefit), in the society (transformation from information to network society) and by technology (e.g. social media, online study). In this situation the decision is more based on practical experiences and outcomes in the home institution and other institutions while sponsors are guided by the decision makers to take particular routes. Of course, your sociogram can also be a mix of both sociograms.

Please try to draw the sociogram for your university, faculty or department:

Tool for self-analysis (Content)

This tool works on identifying and evaluating the institution's current LLL-strategy. Once the status quo of the current strategy has been mapped, it invites the user to review this strategy and to formulate three priorities for the medium term, which will be analysed in more detail and for which an Action Plan will be produced.

It is recommended to use this tool in combination with the Tool for Benchmarking further below in order to get some more ideas for potential LLL-priorities for the coming years (especially sections "Revisiting your LLL-Strategy", "Benefits" and "Action Plan").

Describe your university's LLL strategy/position

Please, describe briefly the overall university vision³ concerning ULLL

What is the mission⁴ of the institution towards ULLL? Which documents describe the mission?

Mission of institution towards ULLL

Which strategies have already been implemented and which are still under discussion?

Strategies already implemented

³ **Vision:** Defines the desired or intended future state of the institution in terms of its fundamental objective and/or strategic direction in a long term view.

⁴ **Mission:** defines the fundamental purpose of the institution, basically describing why it exists and what it does to achieve its Vision.

What are the goals⁵ of the institution towards ULLL?

Goals of institution towards ULLL

Amongst these goals, please choose the 3 LLL priorities for the next coming years until 2015.

Three LLL priorities until 2015
1.
2.
3.

SWOT analysis of your 3 LLL top priorities

For these 3 LLL top-priorities of your institution, where do you perceive their strengths, weaknesses, opportunities and threats?

Please, try to be frank and candid here.

--

⁴ **Goals:** what do we want really? There are a lot of 'similar' words in a strategic planning activity: desired end states, plans, policies, goals, objectives, strategies, tactics and actions.

Revisiting your LLL strategy

At the end of this exercise, do you think it would be useful to re-formulate the current approach of Lifelong Learning of your university, also in view of the 10 commitments given in the European Universities' Charter on Lifelong Learning⁶ as well as the BeFlex Plus recommendations⁷ and in view of the Benchmarking tool (see below)? Please, feel free to choose your own approach to Lifelong Learning no matter whether it is top-down or bottom-up.

You can either use the template below for the formulation of your strategy or use one which is more suitable for your university's approach. Also, you may want to take into account your second diagram (see the Tool for Benchmarking, Diagram 2 – Future Scenario & vision of your university concerning the 10 Commitments) to visualise your future ideal Lifelong Learning University scenario.

Vision

Mission

Goals

3 LLL priorities

⁶ Please see the website http://www.eua.be/fileadmin/user_upload/files/Publications/EUA_Charter_Eng_LY.pdf (last accessed on 27/10/2011)

⁷ Please see the website http://www.eucen.eu/BeFlexPlus/Reports/ExecSummary_FINAL.pdf (last accessed on 27/10/2011)

Benefits

Please select 3 priorities out of your own established list of priorities above. What benefits would result if you improved significantly in these areas?

Things you might consider could include:

Staff

Student profile

University-Community interface

University reputation

Other

Action Plan

Please develop an Action Plan to progress in view of your 3 selected priorities.
You can use the following questions as a guideline or write down your own Action Plan.

Which actions are you planning to implement?

What are the conditions to meet (internally and externally)?

Which resources do you need?

What are the key actors (you may also refer to insights gained from the Tool for self-analysis)?

How to mobilise them?

What could be a suitable funding model?

Tool for Benchmarking against the European Universities' Charter on LLL

This section presents a method for positioning by using a benchmarking tool based on the ten commitments of the European Universities' Charter on Lifelong Learning proposed by the European University Association (EUA) in 2008⁸. You can use this tool to benchmark your institution's LLL engagement and to define its present position and own priorities for transformation⁹. A set of examples of good practices for each commitment helps the user in their understanding.

It is recommended to use this tool together with the Tool for Self-Analysis (Content) in order to get some more ideas for potential LLL-priorities for the coming years (especially sections "Revisiting your LLL-Strategy", "Benefits" and "Action Plan" of the Tool for Self-Analysis).

Where is your university on each of the 10 commitments?

Please rank your university to the following scale, but bear in mind that while a perfect 0 is possible, a perfect 10 is probably impossible! Please, also include a short statement of evidence explaining why you ranked your university the way you did.

The 10 commitments can also be used in different ways to identify the position of your university with regard to Lifelong Learning.:

A. For ranking purpose

1. At individual level:
Ask different actors (including yourself) to rank the faculty/university according to their perception.
2. At faculty / university level:
Combine the rankings and the explanations given by various staff members to describe the present position in LLL and use the ranking for strategy development.
3. At university level by students:
Ask present (potential) students to rank the university from their perception of LLL at their university and let them explain why they perceive it like that and what they think is missing.

B. For in depth analyse

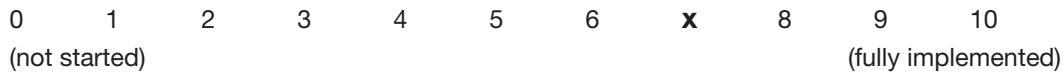
Take the individual rankings in the faculty/university and discuss the different rankings given and the different explanations. Divide the answers in different actors (e.g. decision makers, managers, researchers, teachers,) and explain what causes the differences between the groups.

⁸ Please have a look at section Results – Illustration of the EUA's Charter for an explanation of 10 commitments of the European Universities' Charter on Lifelong Learning.

⁹ This benchmarking tool can only be used for self-positioning and is no legitimate support for a comparison between institutions as it is a self-ranking and strongly depends on individual perception.

Example from Tartu (EE)

Commitment 1 Your university is embedding concepts of widening access and lifelong learning in its institutional strategies:



The concept of widening access and LLL is fully integrated into the strategic plan of the University of Tartu, but it is not visible in the strategic documents of all faculties and colleges. Therefore the University of Tartu can be ranked between 6 and 7 in view of the first commitment of the European Universities' Charter on LLL.

1. Your university is embedding concepts of widening access and lifelong learning in its institutional strategies.



2. Your university is providing education and learning to a diversified student population.



0 1 2 3 4 5 6 7 8 9 10
(not started) (fully implemented)

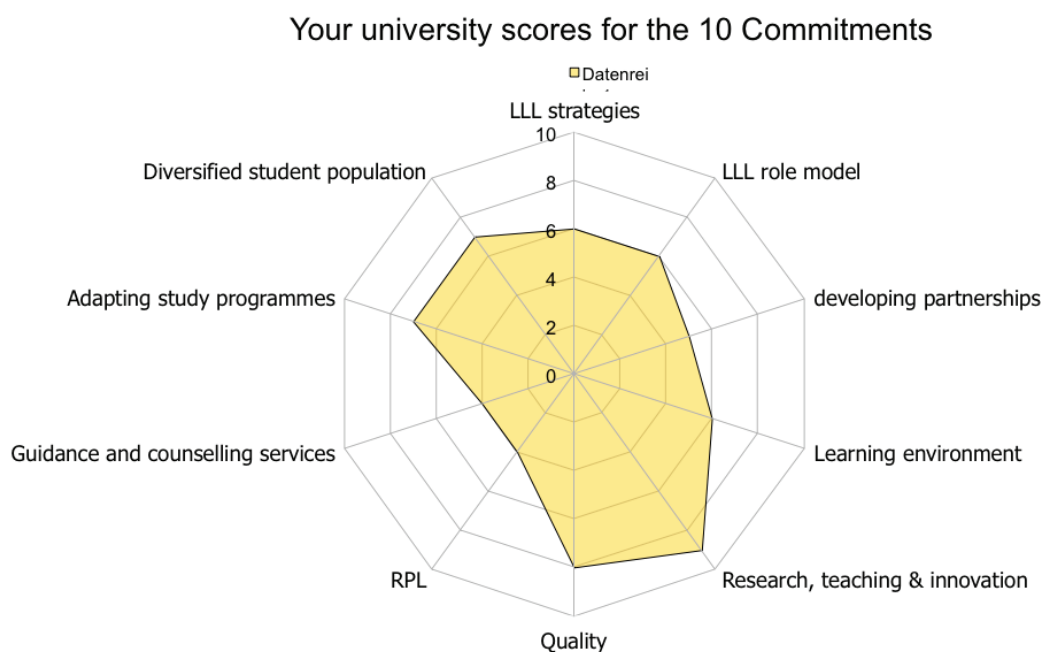
0 1 2 3 4 5 6 7 8 9 10
(not started) (fully implemented)

0 1 2 3 4 5 6 7 8 9 10
(not started) (fully implemented)

For a visualisation of your university's performance in relation to the 10 Commitments, you are invited to create a spider diagram, which will show you your strong points and possible areas of improvement. For creating such a diagram, please enter your scores in the table included in the provided excel spreadsheet¹⁰. The following graph serves as an example of a possible diagram.

36

Diagram 1 – Current status quo of your university concerning the 10 commitments



Importance of the 10 commitments

Could you please rank the 10 commitments in order of priority for your institution?

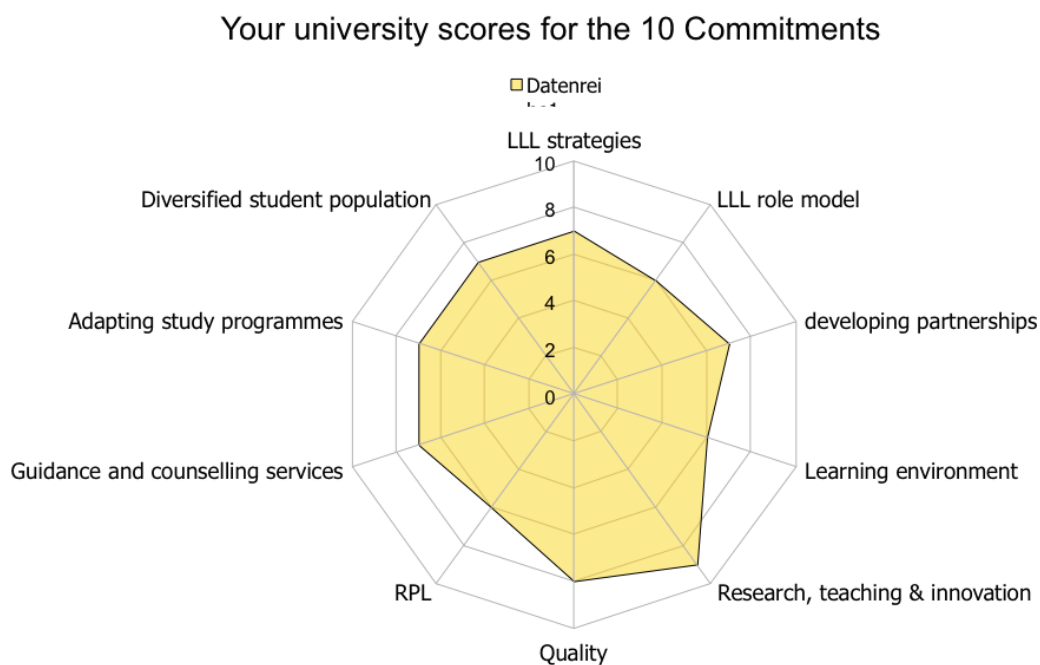
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

Your LLLU strategy framework

Based on the subsections above (“Status quo & future scenario” and “Importance of the ten Commitments”), please create a second diagram where you draw the vision of your proposed framework, so a visualisation of where you would like to see your University within a couple of years.

Diagram 2 – Future Scenario & vision of your university concerning the 10 Commitments

Here you will find an example for a possible diagram:



Problems in implementation moving towards number 10 on your LLL strategy framework

If you compare now the two diagrams, what stops you moving to the right on the scales?

Things you might consider could include:

Strategy (vision not clear or goals not yet defined)

University priorities

Organisational barriers

Staff attitudes / internal communication processes

Finance

Other factors

4

Results

Illustration of the EUA's Charter

Lifelong Learning may still seem to be very abstract, but a crystallization of the vision appeared in 2008. In that year the European Universities' Association produced a Charter on Lifelong Learning¹¹. The Association indicated that:

...The European stage is set for lifelong learning, and the decade of reforms that has taken place to develop the European higher education and research areas now needs to be consolidated and taken forward to address lifelong learning challenges, taking account of existing achievements and good practice in Europe's universities to meet diversified learner needs. Currently the terminology of lifelong learning embraces many concepts – including initial education for disadvantaged groups, continuing education and training for well-qualified graduates, and post-retirement opportunities for cultural enrichment – and is subject to considerable local, regional and national interpretation.

More importantly,

For a European dialogue to be effective in guiding local and national developments, it is important to define better the overarching concepts and practices, and to clarify more precisely the particular contribution to the lifelong learning agenda that can be made by creating a culture of inclusive and responsive European universities.

More practically, Universities which signed the Charter for Lifelong Learning are committed to:

1. Embedding concepts of widening access and lifelong learning in their institutional strategies.
2. Providing education and learning to a diversified student population.
3. Adapting study programmes to ensure that they are designed to widen participation and attract returning adult learners.
4. Providing appropriate guidance and counselling services.
5. Recognising prior learning.
6. Embracing lifelong learning in quality culture.
7. Strengthening the relationship between research, teaching and innovation in a perspective of lifelong learning.
8. Consolidating reforms to promote a flexible and creative learning environment for all students.
9. Developing partnerships at local, regional, national and international level to provide attractive and relevant programmes.
10. Acting as role models of lifelong learning institutions.

¹¹ See above and under http://www.eua.be/fileadmin/user_upload/files/Publications/EUA_Charter_Eng_LY.pdf

Although the 10 commitments have been developed for the institutional level, each of the commitment can be read for use at the faculty, the department and even at the individual level. In this document the focus is at institutional level. Therefore each commitment has been illustrated with examples from the universities that collaborated in the ALLUME project.

1. Embedding concepts of widening access and lifelong learning in their institutional strategies

This means that universities will grasp the opportunity to address lifelong learning centrally in their mission and strategy as part of a wider definition of excellence. The complexity of Lifelong Learning concepts has to be acknowledged and explored as a key aspect of developing the contribution by universities to a culture of Lifelong Learning.

Example: University of Tartu (EE)

In 2009, the University of Tartu approved its strategic Plan 2009-2015 (<http://www.ut.ee/544423>). It is the first time that the LLL concept and objectives have been integrated in a general policy paper of the university. The action plan to achieve the objectives is composed and revisited each year. The strategy is also supported by the University of Tartu LLL principles, which were also approved in 2009. (In previous documents, the importance of widening study opportunities for adults was mostly mentioned in connection with degree studies and e-learning. Next to the university's strategic plan there were other separate strategic documents for CE and e-learning.)

The vision, mission and goals of LLL are formulated according to the university's strategic plan and LLL principles.

2. Providing education and learning to a diversified student population.

This means that European universities will respond positively to the increasingly diverse demand from a broad spectrum of students – including post-secondary students, adult learners, professionals who seek to up-grade skills for the workplace, senior citizens taking advantage of their increasing longevity to pursue cultural interests, and others – for high quality and relevant higher education throughout their lifetime. European universities recognise the important contribution that a diversified student body will make to the development of a culture of success and innovation in the institution and wider society, and the need to think to which extent different types of learners can interact in a supportive mutual learning environment.

Example: University of Turku (FI)

The university has a substantial offer of services for both degree students and adult students. The focus of development is on accessibility, usability and coordination of services. Each faculty, institute or special unit has its own special emphasis, including offers for degree students and the working population, as well as for children with lecturers for 7-10 year-olds and a science campus for children aged between 10 and 12 years.

At the institutional level, the key stakeholder group of Lifelong Learning are the alumni. The alumni network offers wide expertise with contacts, knowledge, experience and new ideas. For more detailed information, please see section 9 Target groups of ULLL of the Turku case study.

3. Adapting study programmes to ensure that they are designed to widen participation and attract returning adult learners

This means that flexible and transparent learning paths need to be in place for all learners enabling them to access and succeed in higher education in all its different forms. It is an essential responsibility of universities to ensure that this educational offer is always of high quality. European universities acknowledge the diversity of individual learner needs and it is therefore their responsibility to adapt programmes and to ensure the development of appropriate learning outcomes in a learner-centred perspective. They also pledge to play their part in promoting widening participation and continuing education.

Example: Catholic University of Louvain (BE)

The overall basis for the organisation of teaching at UCL is centred on students but there are only a few opportunities for individualised learning progressions in line with the decree. Therefore, increasing the number of LLL programmes (without additional resources) and maintaining/improving existing ones as well as strengthening the policy of receiving and promoting mature students are among the goals of UCL.

In that sense, some degree programmes are adapted at the pedagogical, organisational and partially at the content level in order to facilitate the access of working students and to ensure the programme's continuing appeal.

The certificates and other short programmes are constructed so as to respond to the different objectives of mature students, to specific societal demand or to specific organisation's (enterprises, public administrations or associations) needs.

The application forms for some degrees and nearly all certificates notably take account of prior learning and experience and enable these elements to be integrated into the teaching provisions.

4. Providing appropriate guidance and counselling services.

This means that relevant academic and professional guidance, as well as other psychological counselling, should be available for all qualified potential students when needed. This support should be relevant to learners of all ages, and from all social and cultural backgrounds.

Example: University of Ghent (BE)

Due to legal developments and the flexibilisation of learning pathways, it becomes more and more clear that investment in guidance and counselling, either at the level of individuals (candidates) or for specific target groups, will become increasingly important at the Ghent University Association and its member institutions. Ghent University Association and its members offer specific support for students including mentoring (senior students guiding freshmen), student counselling (including study method, study planning, etc.) and supplementary courses to bridge the gap within secondary education. Moreover, the offer includes a variety of orientation events for last year students in secondary education, the LASSI-test (learning and study strategy inventory – self-test) for new students, full-time study track counsellors at all departments/ faculties, information sessions for students with an individualised learning track, information for students interested in studying abroad and feedback sessions after exams.

5. Recognising prior learning

This means that universities should ensure that everybody with the potential to benefit from higher education provision is enabled to do so. It is therefore essential for universities to develop systems to assess and recognise all forms of prior learning. This is particularly important in the context of Lifelong Learning in a global era where knowledge is acquired in many different forms and places.

Example: University of Brest and University of Lille 1(FR)

Following the French regulations on RPL, the two universities have implemented a full range of procedures and tools to assess and recognise all forms of prior learning. APL/RPL system started in 1985 with a decree concerning Higher Level Education called “Validation for Access in the universities”. This decree determines the conditions of validation professional experiences or of personal learning outcomes for gaining access to the various levels of Higher Education. A law published in 2002 organised the procedure of RPL for all French diplomas (Apart from the PhD all degrees delivered by the university are concerned). These universities, such as most of the other French one, have organised a complete system dedicated to this specific way to access in more than 50% of the cases, to the full diploma.

6. Embracing Lifelong Learning in quality culture

Europe’s universities have taken important steps in developing internal quality culture and assuming prime responsibility for the quality of their provision. This work will adapt to an evolving framework for Lifelong Learning in order to ensure that an appropriate range of targeted learner support services are provided for increasing numbers of more diverse learners.

Example 1: University of Turku (FI)

The University of Turku was one of the four nominees for the national quality label of a University of excellence in adult education during the period 2006 – 2009. The reason Turku was nominated for this competition was their very useful learning environment for the constant improvement of quality assurance; success in the competition demanded a good balance between strategic aims and evidence of practical outcomes.

In its evaluation feedback for the University of Turku, the Finnish Higher Education Evaluation Council acknowledged the balanced and clearly documented development of pedagogy and content in adult education. The University has participated in various international projects so as to enhance the quality of lifelong learning. Recently, the quality systems of all Finnish universities have been accredited including adult and continuing education.

Example 2: Université Catholique Louvain (BE)

In order to monitor the programmes development the UCL has developed a quality procedure for LLL programmes (named Procédure d’Agrément) for more than 10 years. All the programmes mentioned within the UCL’s offer are monitored and ‘agreed on’ by the faculties/schools and by the LLL Council (COFC). This means that they satisfy the quality

criteria at academic, educational and organisational levels and are recognised as a part of the UCL Education programmes. This quality procedure for programme development has proved to be efficient and flexible. Therefore, the UCL has decided that it needs to be continued.

7. Strengthening the relationship between research, teaching and innovation from a Lifelong Learning perspective

This means that universities' research and innovation missions can be strengthened through Lifelong Learning strategies, and that universities' specific contributions to Lifelong Learning should be underpinned by research. Researchers should also be recognised as a fine example of lifelong learners, whose own educational needs are continually evolving, taking into account the changing skills required by the labour market. Lifelong Learning can also be a source of new research methodologies and topics.

Example: InHolland (NL)

The emergence of research is an important element within the college. First, this approach intends to increase the quality of education and second, research has an independent role for the professional production of knowledge.

Furthermore, in order to realise its mission, InHolland intends to establish an Institute for Lifelong Learning for sustainable development embedding a LLL culture and promoting LLL at the University of Applied Sciences as well as in the external environment. Thus, the pillars of this institute will be knowledge, research, networking and partnerships, demand and service, dissemination, valorisation and professionalism. One particular pillar of this structure will be the establishment of a professorship of LLL in order to strengthen the development and implementation of LLL.

8. Consolidating reforms to promote a flexible and creative learning environment for all students

In creating European higher education research areas, Europe's universities are engaged in the development of major reforms which aim at placing all learners at the centre. Universities now need to exploit the potential of these reform processes and their tools (ECTS, Diploma Supplement, European Standards and Guidelines for Quality Assurance, Qualifications Frameworks, etc.) to enhance the development of a creative Lifelong Learning environment that is open to a more diverse population of learners, and thus responds to societal needs for the modernisation of higher education. Fully integrating Lifelong Learning into the mission of universities is essential to enhance the creativity and innovation profiles of institutions.

Example 1: University of Malta (MT)

The University of Malta recently introduced two concepts that will enhance democratic access to its courses. Adult participants can now attend single courses for free. Their attendance is officially acknowledged by the university administration. Also, a first cycle degree in Liberal Arts, cumulative in nature, will help adult participants work at their pace towards a degree which would be virtually impossible for them to obtain within a traditional academic framework.

Example 2: University of Aveiro (PT)

Throughout and even before the implementation of the Bologna Process the University of Aveiro developed different programmes dedicated to adult students: For instance, the CET programmes, degree modules (carrying credits) or masters, non-degree programmes mainly CPD or ODL initiatives. An interface unit (UNAVE) was created in 1986 to diversify and intensify the CPD programmes. External changes (i.e. the legal context, public funding) led to a re-thinking of the university, to the nomination of a vice rector for LLL and to the creation of a 'Mission Group' for LLL in 2010.

9. Developing partnerships at the local, regional, national and international level to provide attractive and relevant programmes

Providing relevant educational provision in a Lifelong Learning context cannot be done by institutions on their own. The need for structured partnerships – with a range of other educational institutions, employers, employees' organisations (trade unions) as well as with other stakeholders – is essential if provision is to be responsive, flexible and innovative.

Example: University of Brest (FR)

New curricula based on learning outputs were designed in close cooperation and partnership with professionals, organisations and public stakeholders to meet professional needs. A given example is the creation of a professional bachelor in cooperation with bank counsellors and human resources managers. Furthermore, an office for work based learning management which supports the creation of professional bachelor programmes was created within the UCE departments in 2008.

10. Acting as role models of lifelong learning institutions.

This means that universities are not only providers of higher education and research, but also major employers in their own right. They therefore have the potential to act as role models in society by offering lifelong learning opportunities for their own employees – whether academic, administrative or technical and auxiliary staff. They should also be key actors in lobbying for coherent policy development in national systems.

Example: InHolland (NL)

According to the education vision of InHolland, it is not only important to invest in the current teacher, but also in the aging teacher. This investment needs to be made with regard to professionalism in the teaching field, digitization, didactics and competency-based education. Moreover, career paths should be developed individually.

In addition, the University of Applied Sciences should be able to envision a Lifelong Learning development into different directions such as in the expertise of professionals, in teaching itself as well as in research and management. These elements are comprised by an ongoing investment in the HRM training policy... Teachers create opportunities for further development in their areas of expertise by following Masters, or possibly by taking a PhD track.

Transversal analysis on the LLLU strategy process

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Christine Hesse, Sonocom sprl (BE)

Introduction

This paper presents the transversal analysis done on the case studies developed and collected in the Context of the EUCEN project, ALLUME, 'A Lifelong Learning University Model for Europe', funded with the support of the European Commission.

The paper explains the methodology used to do this interpretation and transversal analysis using a Strategy-as-Practice approach, an emergent Strategy trend amongst scholars and practitioners. It summarises the major results.

The paper is structured as follows:

- » Objective of the analysis
- » The source material
- » Strategy-as-practice – Whittington
- » Methodology of the analysis
- » Explanation of the meaning categories and units
- » Transversal analysis
- » Universities' perception
- » Comparison between CS analysis and perception

Objective of the qualitative analysis

In this analysis, with a transversal view, we try to discover, from ten experiences, differences and similarities in the universities' strategizing in the implementation of LLL. The main focus of this analysis is the way- the process- of strategizing, even if some indications concerning the content of these strategies have been identified.

Through these experiences and this analysis, a tool can be developed to help other universities in their route to LLL. It would be useful for universities in view of reinforcing their own LLL strategy.

The source material: 10 case studies

The source material is qualitative in the way it is an analysis of texts coming from the 10 cases studies (self-assessment report) written by the partner universities. These universities had to answer a range of questions in order to know if a strategy of LLL was developed in their own structure, how do they practice (organisation, funding systems, staff, target groups...) . A SWOT analysis was also produced by each university on its own. The template for this case study defined by the project management group includes the 10 following items:

1. Basic information (staff involved in the case or in discussion of the case)
2. Brief analysis of the case study process
3. University's LLL vision, mission and goals
4. LLL-path of your institution
5. Future of LLL at your institution
6. Funding systems of the institution and the LLL activities
7. Institution's LLL Staff
8. Institutions/ LLL target groups and services
9. In-depth SWOT analysisConclusion (do, don't do)

The self-assessment reports have been filled between February and April 2010 and revised after external expert visit until December 2010.

We point out that all self-assessment reports have been written in a collective way within each university as indicated in the next table.

Universities	Number of staff involved in self-assessment report writing	Number of stakeholders involved in preparation ¹³	Number of pages
University of Sciences and Technologies of Lille 1 (FR)	3	21	19
University of Ghent (BE)	2	8	17
Catholic University of Louvain (BE)	6	LLL council mentioned	26
University of Tartu (EE)	4	3	16
University of Brest (FR)	4	1	18
University of Malta (MT)	3	-	11
InHolland University (NL)	3	-	18
University of Turku (FI)	6	3	28
Goldsmiths College (UK)	3	2	19
University of Aveiro (PT)	4	3	10

¹³ Excluding the one involved in self-assessment report writing

The contents of these self-assessment reports are the basis of this transversal analysis. From a methodological perspective, it is important to highlight that these case studies (self-assessment reports) were neither designed nor filled in for the purpose of this transversal analysis. Only the two first questions are dedicated to the strategizing process.

Besides that, in order to have more material in each case study, the perception of each university – or at least of each university's representatives involved in the project - was asked after a first grid of analysis. This material has been used in chapter 7 in order to be sure that the transversal analysis makes sense for the practitioners. This comparison could be analysed more deeply in the future to assess of the Internal **Validity/Credibility/Authenticity** - Truth value¹⁴.

Strategy-as-Practice – Whittington

“Strategy is about how to reach a desirable future. This means firstly thinking the potential futures (in a foresight sense, as discussed below); secondly assessing which of these potential outcome may be more desirable than others, and thirdly identifying ways and making decisions to influence the outcome in the desired direction. “(Durand Th., 2008)

As pointed by Mintzberg (Mintzberg, 2005), “organisations are complex phenomena and managing them is a difficult, nuanced business, requiring all sorts of tacit understanding that can only be gained in context”. To help the managers, strategy tools have been developed to handle the complexity of their environment (Gunn & Williams, 2007) and to make it explicit. The strategy tools are guides in strategic thinking, strategic decision making and strategic implementation processes, as noted by Knott (Knott, 2008): for instance, defining the strategy, the vision, and the mission or making decisions on allocating resources to pursue the defined strategy, and so on.

Universities like most organisations are in constant battle to develop and implement strategy which addresses the complexities of their business environment.

While strategic goals and objectives from university to university may vary, depending on their capacities and on their specific environment, the practices, the activities led to elaborate the strategy – the strategizing process – may be similar. The methodology used is worthwhile to be transferred. For this purpose we have adopted the ‘Strategy-as-Practice’ approach.

Traditionally, strategy was seen as something organisations have: the roadmap. But the Strategy-as-Practice approach views strategy as something that is done within organisations (Whittington, 1996, 2006). The Strategy-as-Practice approach followed a trend in social sciences that study with a growing interest what practitioners are actually doing (Jarzabkowski, 2004). Following this approach, it is recommended to focus upon strategists engaged in the real work of strategizing, ‘strategizing’ referring to ‘doing of strategy’: ‘strategizing’ comprises therefore the actions, interactions and negotiations of multiple actors in organisation and the situated practices that they draw upon in accomplishing that activity (Jarzabkowski, 2005).

In 2003, Whittington highlighted 6 key questions that should lead the agenda of Strategy-as-Practice research: How and where is strategizing work actually done?

Who does the formal work of strategizing and how do they get to do it?

¹⁴ Miles and Huberman's Evaluative criteria: Do the findings of the study make sense? Are they credible to the people studied, members of the research community, and others?

What are the skills required for strategizing work and how are they acquired?

What are the common tools and techniques of strategizing and how are these used in practice?

How is the work of strategizing organised itself?

How are the products of strategizing communicated and consumed?

To apply it to the Universities' Lifelong Learning strategy we have selected four of these questions (n° 2, 4, 5, 6) ignoring the 3rd question which is beyond the scope of this project. We have also adapted the first one to the specific context of University Lifelong Learning: we have dedicated it to the rationale behind the LLL strategizing work: why do the university's actors start to define a Lifelong Learning strategy?

In this way, we have defined a 5-dimension framework.

For each dimension of this framework – question on strategizing process -, we have also defined some a-priori category and sub-category of possible answers to it -. The framework is represented in the following table:

Dimension		Category	Sub-category
1.	Why does the process of strategizing begin?	What are the external drivers of change?	
		What are the internal drivers of change?	
2.	Who does the formal work of strategizing?	Who are the internal actors (function/role)?	- Do-ers - Influential persons - Researchers - Decision makers
		Who are the external actors (function/role)?	- Do-ers - Influential persons - Researchers - Decision makers
3.	How is the process of strategizing done?	What is the process' characterization?	Formal or informal
		Which actions are undertaken within the 4 development steps?	Step 1 - Analysis
			Step 2 - Design
			Step 3 - Implementation
4.	What are the tools and techniques of strategizing?	Which tools are used?	
		Which techniques or methods are used?	
5.	How are the products of strategizing communicated?	Where are the products communicated? To whom?	Internally
			Externally
		How are they communicated?	Internally
			Externally

Methodology of the analysis

For this transversal analysis, we used the case study methodology.

The case study is a research method that integrates different, predominantly qualitative, techniques. The combination of different techniques, the articulation and the complementary nature of the material are key issues in the case study approach.

This method was chosen because, in the case study, the boundaries between phenomenon and context are not clearly evident. A case is a set of interrelationships situated in time and space.

The case considered in this analysis is the Lifelong Learning strategy (phenomenon) at university (specific context). The core phenomenon of the study is the process of LLL strategy development, in other words, the interrelationships and interactions that exist and develop between individuals belonging to the field of study. The aim of the study, however, is to analyse and understand this strategy development, not just in general, but within several universities. So university is the 'context' where the phenomenon (LLL strategy) will be analysed. The two elements are closely interconnected: the phenomenon and the specific context where it occurs cannot be separated.

It is related to Yin's definition of the case study “... *an empirical inquiry that investigates a contemporary phenomenon in a real-life context, when the boundaries between phenomenon and context are not clearly evident, and in which multiple empirical sources are used*”. (Yin, 1989, p.25)

According to some authors (Schramm, 1971, cited by Yin, 2005, p. 17), the case study investigates a decision or a set of decisions. The case study therefore involves examining and understanding the reasons for such a decision and identifying who made the decision, why and how it was realised or implemented and what were the results of its implementation. This is analysed through the self-assessment reports.

Clearly, in this case study, we have made at the beginning of the research a strong hypothesis on the inter-site (inter-university) comparability.

The principles of qualitative analysis are relevant: saturation, triangulation, validation.

As Mukamurera, Lacourse, Couturier (2006, p. 125) wrote, “*In qualitative analysis, the researcher **searches for meaning**. This meaning is **not directly given**; it emerges by examining codes and coded data blocks and by connecting the different components to reveal meanings that are sometimes implicit in the data.*”

To try to find this meaning, the material (i.e. the 10 self-assessment reports) has first to be ‘reduced’, summarised and coded.

To begin with, **appropriate codes** are created by choosing (upper and lower-case) letters that best sum up a significant component of the case.

For Huberman and Miles (1994, p. 96), a code is “... *a collection and organisation tool to help the analyst quickly identify, extract and then reordering all the segments related to a given question, hypothesis, concept or theme. This reordering sets out the path for the analysis (...)*”

This list of codes is created and modified as long as new meaning unit emerges and until the saturation is reached¹⁵.

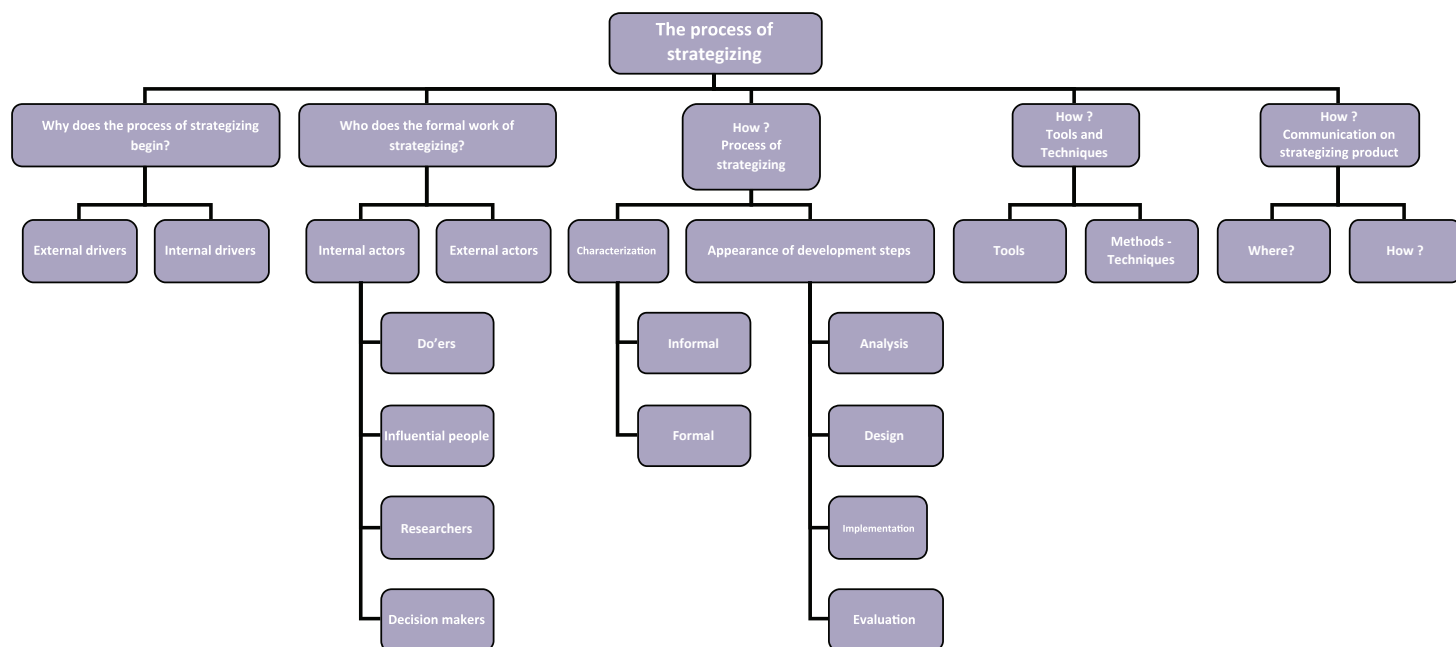
The list of codes has been first carried out by using the categories in Whittington's 'Strategy as Practice' theory. Therefore, the categories (and sub-categories) are preliminary defined on the basis of this theory, but have been adapted according to the meaning units found in the 10 self-assessment reports.

In Chapter 5, we present, explain and illustrate the meaning categories and units, and the different created codes.

Matrices have then been constructed on the basis of this condensation and categorisation. A matrix is a table. This matrix presentation of categories and codes has an analytical dimension and allows us to carry out the transversal analysis of the cases.

In Chapter 6 -Transversal analysis - we present the different matrices with the categories and codes in the rows and, in the columns, the 10 universities involved in this case study.

These matrices are easy to read and allow an easy comparison between the different strategy development processes set up by the universities. Similarities and differences are highlighted.



¹⁵ Saturation means that once a certain amount of information has been obtained, the probability of collecting original information, and therefore the probability of observing a new model of meaning, becomes very low.

You find below these meaning units with their explanation and illustration. The examples (in quotes) are selected for their capacity to illustrate the meaning unit, not for their relevance or recurrence in the self-assessment reports. They are completely anonymous.

1. Why does the process of strategizing begin?

The first question is: “Why universities do begin a process of strategizing for the implementation of LLL in their structure?” What are the drivers of this process?

In this dimension, 2 categories were created: **the external drivers and the internal drivers.**

1.1 The external drivers

By external drivers, we mean drivers which are outside of the university structure.

In this category, 8 meaning units that make sense have been identified:

1. Legislation - Politics (National, Regional, Local)

*“At the regional level, **a global economic development plan called the Marshall plan**, was launched in 2004, introducing the policy of “poles of competition” in sectors where the region already has significant potential for technological innovation and reinforcing synergies at the research level between industry and university”*

*“**The government’s decision** to continue to consider education as a social good...”*

2. Public finance (National)

*“It’s very difficult to have a clear perspective. The main trends are clearly a decline **of state public funds...**”*

*“However, it would not be realistic, at least in the short term, to develop new degree programmes if **government funding** does not allow it.”*

3. Europe (Social fund, politics)

*“The funding sources are ..., along with **EU funds** ...”*

*“Implementation of ... with **European Social Funds (ESF)** participation (2000-2007).”*

4. Economical situation or structure

*“The biggest influence to the LLL market is **current economical situation** and...”*

*“The **current economical crises** might stimulate individuals (e.g. unemployed people) to engage in lifelong learning”*

“From a national or regional geographical point of view, the University is far from big centres. Economic structure of the region or sub region is not so good”

5. Duty to society - National vision - Development of society

*“Under the umbrella of ‘Creating change, locally and globally’, university’s Aims and Values note that one of its aim is ‘**being socially aware and socially active**, enhancing employability in rewarding careers’ and ‘**fostering a social and intellectual community...**”*

*“The multifield education of the University means wide responsibility to educate experts and **ability to react to the needs of society** through the creation of new combinations of expertise over the traditional fields of research.”*

6. Markets

“...internationalisation affects virtually all professions and is therefore largely determines the professions.”

“Moreover, the labour market and the job demands have undergone strong changes, and the knowledge world has also become globalized.”

7. Structural problem of funding

“The context of academic lifelong learning had become exceptionally challenging because of the structural problems of funding...”

8. Demography

“Demographic data highlights the fact that the borough has large and growing ethnic minority populations...”

“As relevant trends, we can identify...and the demographic landscape.”

1.2 The internal drivers

By internal drivers, we mean drivers which are relevant to the university structure.

In this category, 8 meaning units that make sense have been discovered:

1. Investment – budget

“Against a background of no increase in resources ...”

2. Desire to improve access – Awareness

“To complete this overview of our missions, we must include also all the cultural activities, together with “intergenerational university” (also called “university of free time”) and public conferences on several subjects such as history, social activities, and public health....”

“Extending the stipend to students accessing LLL through the maturity clause has opened opportunities for further studies to individuals who have traditionally stayed away from further studies due to financial reasons.”

3. Previous experiences of LLL

“The LLL has developed remarkably during last 10 years. In 1996 the Open University was established to provide life-long learning opportunities with aim to improve access to education and ...”

“These goals are not completely new for our institution. The UCE department has been created in 1973, but nothing is definitively acquired.”

4. Change in internal organisation -Structural change

“...apart from the Bologna reform, two major changes have affected the university as a whole and continue to have an impact on LLL: first, the creation of the university Academy in 2005 and the construction of a new entity since 2008 (on-going fusion of 4 universities); second, the internal reform relating to the separate management of Research and Teaching,...”

“To deal with the increased complexity in the organisation of the university, beside the reduction the teachers, staff, management and to strengthen the Executive Board, the Executive Board decided the reorganisation the education into six domains.”

5. Culture of LLL

“On the other hand, the image of technological education and vocational training is also promoted, and the synergy between the different programs, run in different settings, provides an optimised management of resources: a global awareness is being built within the University Academia.”

“I will highlight the essential role that life long learning will need to play in both supporting and spreading the benefits of such an agenda. The potential for capitalising on cultures and boosting the creative scene will be different for each University city in Europe.”

6. Necessity – demand

“The need for a strategy of adult education in 1996 became evident because of the growth of the volume of LLL at the time of the cutbacks of university basic funding.”

“The number of adult learners should increase. The volume of continuing education and retraining courses should increase 25% by 2015.”

7. Internal cooperation

The activity was generally successful because of the courage to critically analyse the structures and processes and because of the good cooperation between faculties, institutes, the Rector’s office, CES as well as some external parties.

8. University structure (Size, sites ...)

“In other words, the smallness of the institutions does not allow for division of labour by academics.”

“The presence of many educational sites is a strength”

2. Who does the work of strategizing?

The second question is: “Who does the formal work of strategizing LLL within the universities?” Are we in front of a hierarchical model or faced with a limited motivated team of persons in universities or is it informal? Each university has its own process and personnel.

This dimension is split in 2 categories, **the internal actors and the external actors** which are in turn divided in 4 sub-categories regarding to their acts: the Doer’s, the influential people, the researchers, the decision makers.

The Do-ers are those who actually do (or did) the formal work of strategizing.

The influential people (or sponsors) are those who do (or did) influence or support the process of strategizing.

The researchers is a clear concept.

The Decision makers are those who do have (or had) the power of decision in this process of strategizing.

2.1 The internal actors

The Do-ers content 4 meaning units:

1. **Responsible of specific LLL Structure**
2. **Project manager**
3. **Teachers**
4. **Specific units created**

The influential people may be of 4 types:

1. **Rector**
2. **Vice-Rector**
3. **Head of specific unit**
4. **Administratives**

The researchers are:

1. **in LLL - Education**
2. **in others topics**

The decision makers could be divided into 6 meaning units:

1. **Rector or Rector team**
2. **Teaching council**
3. **Head of specific unit**
4. **Administrative**
5. **Outreach council or unit**
6. **Steering Committee**

2.2 The external actors

Sub-categorized in the same way as internal actors, external actors are explicit hereunder.

The Do-ers content 5 meaning units:

1. **Private enterprise**
2. **Public administration**
3. **Specific Ministry**
4. **Government**
5. **Stakeholders**

The influential people may be of 4 types:

1. **Private enterprise**
2. **Public administration**
3. **Specific Ministry**
4. **Government - National or Regional authorities**
5. **Stakeholders**

The researchers are from:

1. **Other national universities**
2. **International universities**
3. **High school**

The decision makers could be divided into 2 meaning units:

1. **Government**
2. **Specific Ministry**

3. How? Process of strategizing

How does the process of strategizing take place in the university, through its characterization and the appearance of development steps?

3.1 Characterization

3.1.1 Informal

In this sub-category, 8 meaning units are relevant:

1. Interaction with society (enterprise, public administration etc.)

“Interaction with society is an integrated component of the basic task of research and teaching.”

“The University has a strong commitment with the regional environment. Each location maintains a network of relationships with companies and institutions within their own region.”

2. Cooperation – Coordination

“In cooperation with its partners, the University exerts an active influence on economic and cultural life and social development, communicates its activities to the public and promotes lifelong learning.”

“As positive aspects we can refer, on one hand, to the promotion of technical and vocational education among youngsters, and the return of mature persons to professional requalification, as well as the improvement of the cooperation between the University and the main economic sectors of the regional economy.”

3. University culture

“Now more than ever, education is considered as a global lifelong endeavour.”

“The University of Turku is a learning community with common values.”

4. Various funding bodies

“Sources of funding are various, Regular payment of registered students through the Ministry of Education (lump sum), Student fee, Contract activities, Projects ...”

“It makes clear that in many cases the funding is not earmarked, project-based and sometimes relying on external funds provided but that with some creativity a lot of results have been achieved creating chances for a variety of individuals.”

5. Response to individual objectives of students

“These certificate and other short programmes are constructed so as to respond to the different objectives mature students may have: 1) to specialise, update knowledge, respond to the need to adapt, structure practical experience by acquiring the theoretical background and undergo professional development; 2) to develop new skills, prepare directly for changing fields, take stock or achieve a personal aim; 3) gain a first university qualification for promotion or professional development.”

“University knows her students and trainees, and their individual learning and development questions.”

6. Increase accessibility to LLL

*“This means that on one hand there is little incentive funding for specific lifelong learning initiatives (except for programmes for students who combine their studies with a job, see infra), but on the other hand it gives **equal opportunities to all kinds of learners.**”*

“The main progress has come on the College’s admissions path; The College’s Recruitment and Admissions Policy covers the general principles that underpin the admission of both undergraduate and postgraduate students and aims to ensure the fair assessment of applications and the inculcation of professional standards for both academic and administrative admissions practitioners.”

7. Mobilisation – Motivation

“To date, the university does not have a formal structure that is fully dedicated to the promotion of LLL.”

“A time graph would look like a ramp with an increasing slope over the last 3 years, as the degree of motivation for LLL in the institution and the involvement of teaching and non-teaching staff has increased.”

8. Recognition

“The third objective is, for full-time lecturers, the recognition of their work in certificate and other short programmes in continuing education following the example of their work in continuing education at degree level.”

“The obstacle is A lack of recognition by professional organisation (mainly employers but not only, also by trade unions), so, few demands arrive directly to university”

3.1.2 Formal

In this sub-category, 10 meaning units are relevant:

1. University strategy

“The strength is the existence of outstanding continuing education structures (the IUFC, the COFC, few faculties’ structures), at both strategic and operational levels, in particular the existence of specific skills in designing programmes for mature students”

“Strategy of the institution is defined and discussed each 4 years and is validated with ministry of HE&R through a pluriannual contract.”

2. Global strategy

“The lifelong learning strategy demanded by the Ministry of Education had been approved as a part of the medium-term action and financial plan in 2006.”

“In January 2009, the Flemish government presented, after some years of preparatory work, its ambitious global plan for the future, called “Flanders in Action - A socio-economic stimulus for Flanders” (“Vlaanderen in Actie - VIA”). In this plan, Flanders is looking forward to 2020. In that year, it wants to assume a leading position among the best performing European regions. For reaching this aim, it was felt necessary to formulate a number of “breakthroughs”. One of these is headed “The Learning Fleming”. ”

3. Creating working groups

“the continuing development of the informal interdisciplinary research group on adult education (RIFA), created in 2009 and probably the formalisation and the embedding of this group in a research centre (GIRSEF) and the continuation of doctoral research in this area (FNRS);”

4. Implementation plan

5. Allocation contract

“The University and the Ministry of Education make a three-year contract that is updated with the allocation of funding annually.”

“The Continuing Education unit (IUFC) was established as a permanent unit and financed by the regular budget of the University.”

6. Academic reinforcement - Academic staff involvement

“University staff is active in professional development.”

“Establishment of a Professorship of Lifelong Learning to strengthen the development, implementation and embedding of sustainable lifelong learning.”

7. Specific council

“The university has APEL¹⁶ regulations since 2003. In each faculty and college has an APEL council who assesses APEL applications and makes decisions.”

“Two bodies support the development of ULLL: a specific Centre (IUFC) and the Continuing Education Council (COFC) responsible for policy and strategy.”

8. Mainstreaming – Holistic

“It has already been mentioned that the University Association and its member institutions, explicitly adopt a holistic view on lifelong learning. This does not make it easy to earmark which jobs or which staff members are specifically dealing with “lifelong learning”.”

“the University decided not to produce a separate lifelong learning strategy, but embedded lifelong learning in the relevant chapters of the main strategy.”

9. Collaboration – Partnership

“Bilateral and multilateral agreements between university and other international universities have increased the opportunities for postgraduate studies locally. These joint ventures, often resulting in joint degrees, are filling a void in the postgraduate scene in Malta.”

“Staff support departments that are developing lifelong learning activities, such as developing links with relevant outside agencies, and as leading partnership developments...”

10. Research based

“The emergence of research within the college is an important development.”

*“The best perspective is to develop partnership with professional organisation (public or private), based on specificities of higher Education **connected with research**. It’s the best way to secure our funding streaming.”*

3.2 Appearance of development steps

3.2.1. Analysis

As far as it is possible to discover in the case studies, in this sub-category, 2 meaning units are relevant:

1. Specialisation studies

“In addition to diversified continuous education, the University will develop specialisation studies that recognise prior learning and promote the attainment of the new special combinations of competence.”

“In 2007, a 4 year research programme was set up to study the motivation of mature students in continuing education at university, with particular reference to the qualifications (degree and non-degree) awarded by the four institutions of the Academy”

¹⁶ Accreditation of Prior Experiential Learning

2. Focus on research market

"In the strategy, the University recognises nationally and internationally competitive areas of research."

3.2.2. Design

How is it implemented? What is the architecture, the context of the strategizing?

4 meaning units are relevant:

1. In regards of learning environment

"The learning environments and recognition of prior learning are in focus."

2. Networks exploitation

"The University and its units will exploit the expertise of the alumni and networks."

"Pillars to strengthen support (internal and external), sustainable expertise and networking between education and the job market, strengthening the demand-driven nature of Lifelong Learning..."

3. Monitoring and agree

"All the programmes mentioned here above have been monitored and 'agreed' by the Faculties/schools and the LLL Council, i.e. they satisfy the quality criteria and therefore are recognised as University programmes."

4. In putting Human resources

"The total number of persons involved in LLL in the institution as a whole is larger than the 50 mentioned above, due to the many activities which are promoted by regular staff and others that are developed within European projects on LLL, for example."

3.2.3. Implementation

What is actually developed and implemented in the University in the process of strategizing?

In the case studies, 12 relevant meaning units were found:

1. Professionalism, Pedagogic training (for teachers)

"the Centre for Excellence in Teaching and Learning was established to develop professional development system for academic staff and offer teacher training courses and counselling."

"To develop international mobility of trainees and staff"

2. Setting priorities

"For this purpose, the institution has established as priority goals the consolidation of the LLL activities which are ongoing in the institution..."

"ULL-target groups will open up real opportunities for our institution;"

3. Special units for LLL

"the University of...decided then to create an Institute for what we called at this period "permanent education"."

"In 1996 the Open University was established to provide life-long learning opportunities with aim to improve access to education and diversify study opportunities as well as to offer more flexible and student-centred courses."

4. Special sub groups LLL in council

"The Teaching Council supports University leadership in the strategic decision-making. The Council has a sub-group of adult education dealing also with the lifelong learning issues."

5. New services

"The policy also establishes – for the first time – service standards for the consideration of applications."

"This leads to the definition of specific arrangements and the implementation of a Service dedicated to guidance and counselling likely to help students to build learning paths the most adapted to their project and individual resources, to support them in making it concrete and to give them an integrated service to avoid difficulties or problems linked to scattered or not connected services."

6. Pedagogic innovation

"...proposes new methods incl. instructed study possibilities at work-place;"

"The University for Applied Sciences enjoys the benefits of scale efficiency through digitisation, and educational approaches - development, but combines this with training on the advantages of small size, students often work in small groups and there is much attention for their personal study career."

"Development of work based curricula (2008). Following the same process than for previous points, we have organised the procedure with internal regulation and created an office for "work based learning management", inside the UCE department."

7. E-learning

"the University Council gave priority to ICT-based learning at our university and the first education technologist was employed to assist the teaching staff in the development of web-based courses."

"the University has developed the implementation of the Bologna Process, and created (and implemented to some extent) initiatives such as: ... open and distance learning (ODL) opportunities for University teaching and nonteaching staff;"

"the creation of pedagogical tools and guidance to help the institution develop technology enhanced learning;"

8. Certification - Product range

"The new certificate and other short programmes are made up on the basis of specially designed activities or on the basis of courses taken from those already available at the University."

"Professional bachelor created for Bank counsellors, with manager of human resources, High Environmental Quality for building Bachelor created with professional organisations, public stakeholders...all these new curricula have been designed with a strong partnership with professional."

9. Internationalisation (Program, audience)

"...promotes international cooperation for development of quality assurance systems and offer more courses to international audience."

"Enhance international participation in the development and implementation of Lifelong Learning for the widening and deepening of the functions of ILLL in the internal and external environment."

"2008 saw the first attempt at the internationalisation, or at least Europeanisation, of a Master's degree designed for mature and working students."

10. Adapting supply - variety of services - Flexible training offer

"The combination of lectures and e-learning ("blended learning") offers students the best opportunities to develop into independent and enterprising professionals with an international orientation."

"The current trend of extending the repertoire of post-graduate studies and of short, specialised and custom-made courses will continue."

"to organise the integration of adults in "normal" programmes by providing flexible learning pathways and validation of what they have learnt informally or non formally;"

11. Recognition of informal and non formal learning

"To secure and optimize recognition and accreditation of prior learning process..."

"This means to aim at individualisation of learning paths taking into account on one side the project of each student and on the other side what he/she learnt before in different settings formally or informally."

12. University Regulation

"We have build, after several discussions and presentation to different university councils, a University level regulation (2004) for participation of adults coming back to university."

3.2.4 Evaluation

Is there an evaluation of the process of strategizing?

Three sorts of evaluation have been discovered in the case studies based on where, by whom or with which tool it has been evaluated:

1. Institutional

"good ongoing links with Senior Management have been and recent favourable reports through Degree Awarding Powers and Institutional Audit;"

2. Assessment report

"In 2005, on the basis of a detailed assessment report, the global LLL objectives and the pilot project were confirmed."

3. External structure (private,

"We are doing the auto-evaluation and we will be evaluated at the end of 2010 by the national quality Agency (AERES)."

4. How? Tools and Techniques

How does the process of strategizing take place in the university, through its tools and Techniques developed? It's sometimes difficult to make the difference between a tool and a technique. In the literature of Whittington, he doesn't make this difference, for him a tool is also a technique. Nevertheless, we try, through the case studies, to differentiate these two concepts.

4.1 Tools

What is actually developed to implement LLL inside the University?

A lot of tools have been discovered in the case studies. 15 tools could be exposed:

1. Organisation chart - collaborative model - hierarchical structure

"The organisation chart of the University is also the basic structure for lifelong learning."

"The provisions that have been implemented for the development of ULLL are based on an "internal and collaborative" model, also called decentralised internal..."

2. Special services to learners (support pgm, point for adult students)

"The construction of focussed guidance point for adult students entering the university"

"LLL students are able to access Student Support Services which offers counselling, chaplaincy, a disability team, a nursery, and a funding information office."

3. Independent structure for LLL

“CES is an independent unit in the University i.e. it is outside the faculty structure under the University Board.”

“A lack of visibility in university. The location and flat for UCE Department is not adapted to our diverse missions.”

4. External funding

“...so that balancing the budget is difficult, this implies a faculty or institutional policy decision to support this kind of activity through other more profitable projects or perhaps even the creation of chairs of continuing education.”

“The main trends are clearly... and the necessity to have more incomes from professional continuing education funds.”

5. Public allocation

“The main funding of InHolland is by the Ministry of Education for the initial students and lifelong learners following (parts of) this regular programme.”

“There is almost complete reliance on State funds. A lump sum (approx. 95% of the university’s budget) is devolved by government, through the yearly budget and administered by the university’s council.”

6. Cost model

“The common budgetary database is worked out to support administration of budget. Each person responsible for sub-account can see their up-to-dated incomes and outcomes online.”

7. Mentoring system

“One of the useful services is the mentoring system, where the members of the alumni contribute to the transition to work after degree studies.”

8. Quality procedure

“The quality procedure – Procedure d’agrément – for the certificate and other short programmes is an important tool in pursuit of the objective of quality in continuing education.”

“InHolland has a number of APL-procedures, partly approved for three years and partly with an extension of the temporary approval for one year.”

9. Executive board

“In 2004, the COFC introduced an executive board to improve the way in which it worked.”

10. Informal learning - RPL - APL

“She goes to University College where she is pointed at the possibility to start the procedure for the accreditation of her prior experience and learning (APEL – EVC in Dutch).”

“The regulation of access, the principles of APL and APEL, are regulated by a 2005 law that also makes provision for the use of ECTS credits and the recognition of CET credits for further studies.”

11. Observatory (Statistical data collecting)

“However, as a result of the harmonisation adopted by the CIUF and the current project to develop a tool to collect statistical data on ‘adults returning to study’ (Observatory), there could be a new opportunity to closely monitor the LLL phenomenon within the university.”

“If we compare the situation, in term of activity and budget, we can consider that the progression is real...”

12. IT Support systems

"Within recent years different support systems, such as (1) Internet based Study Information System which includes both students in degree studies and learners in CE, (2) intranet including several instructions, templates and links to relevant documents, (3) online accounting system to manage invoices and see daily up-to-dated incomes and outcomes of internal accounts, (4) online system for vocations of the university staff, (5) electronic registration system for documentation etc have been developed for better management of studies."

"Also the number of people involved in setting up and maintaining an IT-based system for the administration of study programmes and students that is able of dealing with the flexibility offered, has increased dramatically over the last years."

12. Strategic plan

"The Institutional Plan demonstrates the strategy InHolland. It contains five key points:..."

"These missions are developed and contracted in a formal act, signed each four years, with the Ministry of HE&R."

14. Financial bonus to promote LLL

"The main element in this is the introduction of a financial bonus for specific student groups of which students who combine their studies with a job are the most relevant with regard to lifelong learning."

15. SWOT Analysis

"We want to examine each actions and to put in light their strengths and weaknesses."

4.2. Techniques – Methods

How the tools are taken place in the process of strategizing? What are the techniques and methods put forward in this goal?

A diversity of methods could be used. 14 Techniques were discovered in the material:

1. Incentives for the involvement

"The third objective is, for full-time lecturers, the recognition of their work in certificate and other short programmes in continuing education following the example of their work in continuing education at degree level. The development of financial incentives, such as additional pay or advantages in kind, is an alternative."

2. Support services for the actors

"Internally, the University will clear up the management system of the interaction, produce incentives for the participation and offering support services for the actors in the faculties and institutions."

"Staff support departments that are developing lifelong learning activities, such as developing links with relevant outside agencies, and as leading partnership developments..."

3. Structured course offering

"the growth in LLL courses available at UCL results from the creation of new certificate programmes and other short courses (non-degree) designed for mature students and also from the French Community degree courses that already exist and which accept mature students as a priority or sometimes even exclusively."

"- Continuing education – all kind of courses and training with the aim to acquire new knowledge and develop skills. The CE is financed by learners, employers or by different projects."

4. Reinforce networking

“Pillars to strengthen support (internal and external), sustainable expertise and networking between education and the job market, strengthening the demand-driven nature of Lifelong Learning...”

“On another hand, we must convince firms, professional organisations to work with universities...”

5. Multi-field approach

“Another possibility is to create bridges between degree programmes and other programmes in order to rationalise what is available.”

“Moreover, conditions relating to the educational approach (drawing synergies from the coexistence of groups undergoing initial training and those in continuing education) and practical organisation (timetable and reception) must be fulfilled to enable the formula to be successful.”

6. Budget control - management of costs - Self-supporting

“The financial board of the university is responsible for allocation procedure for state finances. Other incomes (incl. student fees from degree studies and CE as well as projects) are planned by each faculty or structural unit.”

“The control of the incomes is done by a special service in the university who is in charge of the recovery of invoices. The director is responsible of the equilibrium of its budget.”

7. Specific function related to project

“The Centre for Extension Studies is an example of a special unit, where the whole staff works full time for lifelong learning. The core functions are the planning and organisation of courses. In Finnish, we still usually use the traditional “planner” as an official title for the person working as the project coordinator or manager. The planners have different roles as to the production of new courses or projects, the development of work practices or implementation.”

“At each faculty/department there is a full-time study track counsellor (+ 1 FTE per faculty/department)”

8. Triangle approach in practice

“An important characterisation of higher education has to do with competence-based learning. The essence of this form of education is that it is close to the trained professionals. It uses real professional situations, so students are helped as realistic and adequate as possible to take or strengthen their place in the profession. In other words, there is need for training in close consultation with the profession and this should be maintained and strengthened where necessary.”

“We have to always look for new activities, new “clients” and prospect the market. May be, communication and marketing could be enhanced.”

“CES and UTU regional development is accustomed to the knowledge triangle approach in practice.”

9. Create image for LLL

“...and (3) improve the quality of continuing education programmes and create a strong and attractive image for continuing education at University.”

“Our institution has a long history in the domain of UCE (1973) and a national visibility because of our participation in networks,”

10. Mixed audience, group

“In these circumstances, the target group is mixed as it comprises both students undergoing initial training and LLL participants (mixed audience).” “- CE learners studying together with degree students – the person interested in certain subject from degree curriculum can study together with degree students (both full-time and open university students). If they fulfil all the requirements they will receive the CE certificate.”

11. Decentralised model

“Decentralised because it is the faculties who have academic responsibility for programmes and teaching, supported by the Continuing Education Council and the University Institute for Continuing Education. Structures to promote dialogue have been created by the central bodies to enable a well-coordinated position to be presented at university level.”

“The university has dedicated personnel.”

“existence of outstanding continuing education structures, at both strategic and operational levels...”

12. Monitoring quality

“Professional quality: a high level of professionalism for all employees in all parts of the organisation. Issues: • Continuous monitoring of quality.”

“However, apart from certain faculties where the procedure is widely used or has been used for a considerable time, there is little or no discussion on the quality of the procedure or monitoring for quality.”

13. Long-term support

“Make sure of the Authorities’ support on a long-term perspective;”

“At local level, 3 successive Presidents have supported this development, with quite good results, so why would they stop the process?”

“We are looking for higher support from regional authorities, but the best perspective is to develop partnership with professional organisation (public or private).”

14. Comparison (national and international)

“Another trend is national and international comparison. We try to develop participation to events, conferences, seminars...and also personnel mobility...”

5. How? Communication on strategizing product

How is the process of strategizing communicated inside and outside the university?

Through this question we can also turn our attention to vectors of communication used by the University.

There is little information about this aspect in the case studies probably because most of the universities are not yet far enough in the process to consider the communication.

5.1. Where

What are the communication’s vectors used to widely make known the strategizing product.

We could find 5 vectors in the material, such as:

1. Alumni organisation
2. Press
3. Internal Newsletter
4. Scientific publications
5. Web site

5.2. How?

Which methods of communication are used to make known the strategizing product?

Here, 4 meaning units found are:

1. Broader discussion - round table consultations

“Then, at the beginning of 2010, the Minister for Education brought about broader discussion of the development of higher education by organising a series of round table consultations. University LLL was the subject of several discussions.”

2. Embedded communication plan

“The work of promotion, communication and information carried out by the IUFC both internally and externally must be continued, increased and supported by the authorities. Action: It would be attractive to integrate it further into the global university communication plan.”

3. Round tables for development of CE

“The Open University Centre who is responsible for development of CE and e-learning initiated roundtables for development of CE and e-learning in different subject fields.”

“Another reason is that questions can be more challenging for the internal workgroup to further work on and finally, these questions could also form the basis for a broader debate, also with external stakeholders, on cooperation in lifelong learning.”

4. Events, conferences

“Within PACE, Goldsmiths has a dedicated Centre for Lifelong Learning. The Centre builds upon teaching, learning and research projects within PACE, and aims to develop teaching and learning materials to promote Lifelong Learning. It also holds events to publicise and promote its work.”

“We try to develop participation to event, conferences, seminars...and also personnel mobility...”

In the next chapter, we present the transversal analysis through these meaning units explained above.

Transversal analysis

In this chapter, we present the transversal analysis through matrices regarding to the categories explained above.

In these matrices are pointed the meaning units found in the material following this rule:

+	-	Appears low (less than 3 quotes)
++	--	Appears moderately (3 to 4 quotes)
+++	---	Appears strongly (5 quotes or more)

In this way, by putting universities in column, the similarities and divergences between the different processes of strategizing are highlighted.

The drivers

why?	Meaning units	Codes	P2 - Univ Lille	P3 - Univ Ghent	P4 - UCL	P5 - Univ Tartu	P6 - Univ Brest	P7 - Univ Malta	P8 - Univ InHolland	P9 - Univ Turku	P10 - College Golds- mith	P11 - Univ Aveiro
External drivers	Legislation - Politics (National, Regional, Local)	LEGPOL	++	+++	-		+++	++	+	++		+
	Public finance (National)	PUBFIN	+	+	-		+/-	+		+		+
	Europe (Social fund, politics)	EUROP			++	+	+			+		+
	Economical situation or structure	ECON	-	++ / -		-	+ / --	-	+	--	-	+
	Duty to society - National vision - Development of society	SOC	+++	+	+++	+	++	+	++	+++	+++	++
	Markets	MARKET	+	+	+	-	++	+	+	++		
	Structural problem of funding	FUND								+		
	Demography	DEMOG				+ / --					+	+
Internal drivers	Investment - budget	BUDG			-					-		
	Desire to improve access - Awareness	ACCESS		+	++	++	+	+++	+	++ / -		++
	Previous experiences of LLL	PREVEXP	++		++	+	+			+		+
	Change in internal organization -Structural change	CHINTORG		+	+				+	+++		+
	Culture of LLL	LLLCULT		++	+	+	+			++	+	
	Necessity - demand	DEMAND	+	++ / -	++	+++		+	+	++		+
	Internal cooperation	INTCOOP		+	+				+	++		++
	University structure	UNIVSTRUCT				+ / -		+				

Evidence and Comment on the Drivers

Regarding the context, the most important external drivers for the 10 universities are 1) the society pressure on the Universities' duty ("being socially aware and socially active") and 2) the legislation (national, regional, local policies). The national or regional economic situation and structure is also identified as impacting – negatively- the ULLL strategizing.

The major internal drivers for the 10 cases are the awareness regarding the necessity to wide access ("our mission") and to take the demand into account ("growth of the volume of LLL or number of adult learners"). Some previous experiences in LLL, a culture of LLL and changes in internal organisation are also identified as internal drivers, but less intense than the first one, except for one university (Turku) where organisational and structural change are considered positively in the ULLL strategy process.

When comparing the balance between internal and external drivers for each university, we observe that for 5 universities (Lille, Ghent, Brest, InHolland, Goldsmiths), the mention of external drivers exceeds the internal one. For 3 universities (Louvain (UCL), Tartu, Turku) the internal drivers are more important than the external ones, even if in the case of Turku, the external ones are quite frequently marked positively. For two universities (Malta, Aveiro), we observe an exact balance of the two.

The actors

who?			P2 - Univ Lille	P3 - Univ Ghent	P4 - UCL	P5 - Univ Tartu	P6 - Univ Brest	P7 - Univ Malta	P8 - Univ InHolland	P9 - Univ Turku	P10 - College Golds- mith	P11 - Univ Aveiro
Internal actors	Do'ers	Responsible of specific LLL Structure	++	+	++	+	+		+	+	+	
		Project manager								+		
		Teachers						+				
		Specific units created	++	+	++					+		+
	Influential people	Rector					++					+
		Vice-Rector	+		+							
		Head of specific unit	+++	++	+	+	+					
		Administratives			+	+						
	Researchers	in LLL - Education										
		in others topics		+								
	Decision makers	Rectorate		+			+					+
		Teaching council			+		+			++		
		Head of specific unit										
		Administratives										
		outreach council or unit										
		Steering Committee					++					
External actors	Do'ers	Private enterprise										
		Public administration										
		Specific Ministry										
		Government										
		Stakeholders										
	Influential people	Private enterprise	+									
		Public administration										
		Specific Ministry	+				+			+		
		Government - National or Regional authorities	+	++ / -	+		+					
		Stakeholders					+			++		
	Researchers	other national universities										
		international universities										
		High school										
	Decision makers	Government		++ / -			+					
		Specific Ministry					+			+		

Evidence and Comment on the Actors

In this qualitative analysis, the internal persons who are participating in strategizing are the responsible of specific LLL structure: they are identified as the major do'ers in 8 universities (more frequently in Lille, Louvain (UCL), than in Ghent, Tartu, Brest, InHolland and Tartu). In Malta, it is a professor who is the main actor in strategizing while in Aveiro, a specific unit has recently been created.

Concerning the influential people in strategizing, globally, the dominant one is the responsible of specific LLL structure as it appears in 5 universities (Lille, Ghent, Louvain (UCL), Tartu, Brest), while the rector in Brest is also identified as playing an influential role in strategizing . The commitment of the Rector or of the teaching council (or LLL council) appears to be important in the decision phase of strategy making. Concerning the external actors, they are mainly identified as government bodies (at national or regional level) and they appear mainly as influential people or decision makers. In one self-assessment report, their role appears to be both positive and negative.

When comparing globally the total number of internal actors occurrences from one university to another, we observe that the strategizing is a more collective process in 5 universities (Lille, Ghent, Louvain (UCL), Brest, Turku). The same comparison concerning the external actors highlights that 4 universities (Lille, Ghent, Brest and Turku) are involving more external actors in their strategizing than the others. At this moment, we assume that there is a relationship between the 'collective' characteristics of LLL strategizing (internally and externally) and the level of development of LLL activities within universities, as indicated in a next table (appearance of development steps) or within the self-assessment reports. It will be worthwhile to confirm it in a future research.

Characterization and Development steps

How? Process of strategizing		Meaning units	Codes	P2 - Univ Lille	P3 - Univ Ghent	P4 - UCL	P5 - Univ Tartu	P6 - Univ Brest	P7 - Univ Malta	P8 - Univ InHolland	P9 - Univ Turku	P10 - College Goldsmith	P11 - Univ Aveiro
Characterization	Informal	Interaction with society (enterprise, public administration, ...)	INTERSOC	++	++	+		++	+	+++	+++	++	++
		Cooperation - Coordination	COOP		+++	+	++			++	++		+
		University culture	UNIVCULT	+		+ / -	+				++		
		Various funding bodies	VARFUND	+	+	+	+			+	++		+
		Response to individual objectives of students	INDIV	+++	+++	++				+	++		+
		Increase accessibility to LLL	INCACC	+++	++	+++	++				+++	+	
		Mobilisation - Motivation	MOTIV	++	-	++ / -	+	++	+		++		++
		Recognition	RECOG	-		--	+	++ / -				-	-
	Formal	University strategy	UNIV-STRAT	++	+	+++	++	+++	+	++	+++	+	
		Global strategy	GLOBST-RAT	+	+++	++		+ / -			+	+++	
		Creating working groups	WORKGR	+	+	+					+++		
		Implementation plan	IMPPLAN				+				++		
		Allocation contract	ALLOC-CONT	+	+	+	+				++		+
		Academical reinforcement - Academic staff involvement	ACAD	+	+	++	++			++	+		
		Specific council	SPEC-COUN			+++	+						
		Mainstreaming - Holistic	HOLIS	+++	+++	+	+	+			+++ / -	+	
		Collaboration - Partnership	COLLAB	+++	-	++		+++	+	++	++	+++	++
		Research based	RESEARCH			+	+	+	+	+	+++	+	
Appearance of development steps	Analysis	Specialisation studies	SPECSTU			+					+		
		Focus on research market	FOCRES-MARK	+							++		
	Design	In regards of learning environment	LEARNENV			+	+				+		
		Networks exploitation	NETEXPL								+	++	
		Monitoring and agree	MONIT			++					++		
		In putting Human resources	HR	++	++	+				+	+		+
	Implementation	Professionalism, Pedagogic training (for teachers)	PEDTRAIN	+	+	+	+++	+++		+	++	+	+
		Setting priorities	PRIOR	+		+		+	+	+	++		+
		Special units for LLL	SPECUNIT	++	+	++	++	++		+	+++	++	++
		Special sub groups LLL in council	SUBGR								++		
		New services	NEWSERV	++	++	+		++			+	+	
		Pedagogic innovation	INNOV	+	+	++	+++	+++		++	+		+
		E-learning	ELEARN			+	+++		+	+	+	+	+
		Certification - Product range	CERT	+	++	+++	+	++		+		+	
		Internationalisation (Program, audience)	INTERNAT			+	+++			+	++	+	
		Adapting supply - variety of services - Flexible training offer	VARIETY	+++	++ / -	+++	+++	++	+	++	+++	++	+
		Recognition of informal and non formal learning	INFORM-LEARN	+++	++	++	++	+		+	+++		++
	Evaluation	University Regulation	UNIVREG				+	+					
		Institutional	EVALINST					+			++		
		Assessment report	ASSESREP			+							
		External structure (private,	EXTERNE-VAL					+			+		

Evidence and Comment on Strategizing Characterization and Development steps

The most important informal elements playing a role during the strategizing process within universities are identified as: 1) interaction with society (enterprises, public bodies, loose cooperation,) and then 2) mobilisation or motivation of the university members, willing to increase accessibility to LLL.

Even if some informal elements play a role in the strategizing process, the process appears to be dominantly formal and formally organised within 6 universities (Ghent, Louvain (UCL), Tartu, Brest, Turku, Goldsmiths). For 2 universities (Lille and InHolland), we observe a balance between informal and formal items while the process is identified as informal for the moment in Aveiro. No evidence is found for the process characterization for the moment in Malta.

For 8 universities (all except for Malta and Aveiro), a 'formal' process is initiated on basis of the following items: 1) in collaboration with external bodies and entities (closed or formal contracted partnership with enterprises, governmental bodies) 2) in accordance with the global university strategy 3) as element of the university mainstream (in a holistic way). We observed that some universities have created specific groups or councils for formalising the strategizing process (Turku and Louvain (UCL)). In one university (Turku), we have noticed a strong link with research in strategizing.

Concerning evidence on strategizing development level, the results show that the majority of the universities are active at the implementation step. The most active universities at the implementation step appear to be Lille, Louvain (UCL), Tartu, Brest, Turku. Four of these 6 universities have developed a collective strategizing approach as mentioned before. The most dominant item concerning implementation is the adaptation of University supply: variety of offered services and flexibility of training paths. The second one is the recognition of informal and non-formal learning.

It is worthwhile to notice that the strategizing evaluation phase is largely under- or not mentioned by the universities, except Turku or Brest which do it sometimes.

The Tools and techniques-Methods

why? Tools and Tech- niques	Meaning units	Codes	P2 - Univ Lille	P3 - Univ Ghent	P4 - UCL	P5 - Univ Tartu	P6 - Univ Brest	P7 - Univ Malta	P8 - Univ InHolland	P9 - Univ Turku	P10 - College Golds- mith	P11 - Univ Aveiro
Tools	Organisation chart - collaborative model - hierarchical structure	ORGCHART	+		+		+			+		
	Special services to learners (support pgm, point for adult students)	SERVSTUD	+++		+		+			+++	+	+
	Independent structure for LLL	INDSTRUCT					-			+		
	External funding	EXTFUND	+	+	+	++				+++		
	Public allocation	PUBFUND	++	+	+ / -	+		+	+	++	+	+
	Cost model	COSTMOD	+	+		+	+			++ / -		
	Mentoring system	MENTORSYS				+				+		
	Quality procedure	QUALPROC			++	+				+		
	Executive board	EXECBOARD	+		+						+	
	Informal learning - RPL - APL	TOOLINFL	++	++	+++	+++	+++		+	++	+	+
	Observatory (Statistical data collecting)	OBSERV			+		+			++		
	IT Support systems	ITSUPSYS		+		++				+	+	
	Strategic plan	STRATPLAN	++			++	+		+	++		
	Financial bonus to promote LLL	FINBONUS		+					+			
	SWOT Analysis	SWOT	+				+					
Techniques – Methods	Incentives for the involvement	INCENTIV			+					+		
	Support services for the actors	SERVACT		+	+	+			+	++	+	
	Structured course offering	STRUCTOFFER			+	+				+		
	Reinforce networking	NETW		+	+	+	++		+	+++	++	
	Multi-field approach	MULTIAPPR			++					+++		+
	Budget control - management of costs - Self-supporting	MANAGCOST	++		+++	+ / -	++			++	+	
	Specific function related to project	SPECFUNCT				+				+		+
	Triangle approach in practice	TRIAPPR	+++		++	+	+		+	+++	+	
	Create image for LLL	IMAG		+	+	+	+				-	
	Mixed audience, group	MIXGROUP	++		++	+						
	Decentralised model	DECENTR	+	++	+++	+	+			+ / -		
	Monitoring quality	MONITOR	+		+++				+	++	+	
	Long-term support	LTSUP	+		+ / -	+	+			++ / -		
	Comparison (national and international)	COMPAR		+	+		+			+		

Evidence and Comment on Tools and Methods

For this part of the analysis, a distinction has to be made between the tools and methods detected as used as LLL strategies and those detected as used during the LLL strategizing process.

The most frequent tool used in the LLL implementation is identified to be ‘the informal learning’ and the associated validation procedure (APL, RPL); the second one includes ‘special services to learners’, i.e. support program for adult learners, guidance, ...).

But the most used tools during the LLL strategizing are respectively 1) public fund allocation, 2) external funding and 3) use of strategic plan. At least 4 universities (Lille, Tartu, Brest, and Turku) mention explicitly the (intense) use of strategic plan.

Concerning the methods used during the LLL strategizing, the results are more diverse: the triangle approach (research-education- innovation), the budget control (cost management or self-financing), the network reinforcement, a decentralised approach have been identified within all universities except Malta and Aveiro.

The monitoring of the quality – more dedicated to the LLL implementation - appears to be important in 3 universities (Lille, InHolland, Goldsmiths) and very important in 2 others (Louvain (UCL) and Turku).

We notice that specific strategy methods (benchmarking for instance) are scarcely mentioned.

The strategizing product Communication

How? Communi- cation on strate- gizing product	Meaning units	Codes	P2 - Univ Lille	P3 - Univ Ghent	P4 - UCL	P5 - Univ Tartu	P6 - Univ Brest	P7 - Univ Malta	P8 - Univ InHolland	P9 - Univ Turku	P10 - College Golds- mith	P11 - Univ Aveiro
Where	Alumni organisation	ALUMORG								+		
	Press - Media	PRESS		+								
	Internal Newsletter	INTNEWS										
	Scientific publications	SCIENTPUB										
	Web site	WEB					+					
How	Broader discussion - round table con- sultations	BROADDISC		+	++						+	
	Embedded communication plan	COMPLAN										
	Round tables for development of CE	ROUNDTAB	+		+	+						
	Events, conferences	EVENT	+	+		+	+			+	+	

Evidence and Comment on strategizing product communication

Only few information concerning strategizing communication is available from the case studies. The events and conferences appear to be the most used way to communicate about the LLL strategizing product.

Universities' Perception

To validate the meaning units and the saturation of our analysis methods, the partners have been invited to fill in the different tables and to note their own perception. They have to select the items relevant to the University's current situation and to mark it with (+) in use or (++) in use intensively. We have to take into account that these perception tables reflect the position of one person in each university while the university self-assessment reports have been written and validated by different people. The perception tables are given hereafter

The drivers

why?	Meaning units	Codes	P2 - Univ Lille	P3 - Univ Ghent	P4 - UCL	P5 - Univ Tartu	P6 - Univ Brest	P7 - Univ Malta	P8 - Univ InHolland	P9 - Univ Turku	P10 - College Golds- mith	P11 - Univ Aveiro
External drivers	Legislation - Politics (National, Regional, Local)	LEGPOL	++		+	++	++	++	++	++		+
	Public finance (National)	PUBFIN	++		+	++		++	+	++	++	
	Europe (Social fund, politics)	EUROP	+		++	+	+	++	+			
	Economical situation or structure	ECON	++		+	+	+	++	++	+		+
	Duty to society - National vision - Development of society	SOC	++		++	++	++	++	+	++	++	++
	Markets	MARKET	+		+	++	+	++	+	+		
	Structural problem of funding	FUND	+			++		++	++	+	++	
	Demography	DEMOG				++		++	+		++	+
Internal drivers	Investment - budget	BUDG	+		+	++		++			++	
	Desire to improve access - Awareness	ACCESS	++		+	++	+	++	++		++	++
	Previous experiences of LLL	PREVEXP	++		++	++	++	+	++	+	++	+
	Change in internal organization -Structural change	CHINTORG	+			++		+	+	++	++	++
	Culture of LLL	LLLCULT	++		+	+	+	+	++		++	
	Necessity - demand	DEMAND	++		+	+	+	++	++		++	+
	Internal cooperation	INTCOOP	++		++	+		+		+	++	
	University structure	UNIVSTRUCT				+		++				

The actors

who?			P2 - Univ Lille	P3 - Univ Ghent	P4 - UCL	P5 - Univ Tartu	P6 - Univ Brest	P7 - Univ Malta	P8 - Univ InHolland	P9 - Univ Turku	P10 - College Golds- mith	P11 - Univ Aveiro
Internal actors	Do'ers	Responsible of specific LLL Structure	++		++	+	++		++	+	++	++
		Project manager	++			++	++		++		++	
		Teachers	++		+		++	+			++	+
		Specific units created	++		++	+	++	+	++		+	++
	Influential people	Rector	++		+	++	++	++	++	++	+	++
		Vice-Rector	+		++	++	++	++		++		++
		Head of specific unit	++			++	++	N/A	++	++	+	+
		Administratives			+	+		+				+
	Researchers	in LLL - Education	+		+	+		+	++	+	++	
		in others topics				+		N/A		+	++	+
	Decision makers	Rectorate	++		++	++	++	++	++	++		++
		Teaching council	++		++	+	+	N/A		++		
		Head of specific unit	++			+	+	N/A	++	++	++	++
		Administratives				+	+	+				+
		outreach council or unit	++		+	+		N/A				
		Steering Committee	+				++	N/A				
External actors	Do'ers	Private enterprise	++				++		+			+
		Public administration	++			+	+	+			+	+
		Specific Ministry	+		+	+	+	+	++			
		Government	+		+		+	+			+	
		Stakeholders	++			+	++	+	+		+	+
	Influential people	Private enterprise	+		+	+	+	+	+	+		
		Public administration	+		+	++	+	++		+		
		Specific Ministry	+			++	+	++	++	+		
		Government - National or Regional authorities	+			+	+	++		+	+	+
		Stakeholders	+		+	++	+	+	+	+	+	+
	Researchers	other national universities									+	+
		international universities			+				++		++	++
	Decision makers	High school										
		Government	++		+	+	+	+				++
		Specific Ministry			+							

Characterization and Development steps

How? Process of strategizing		Meaning units	Codes	P2 - Univ Lille	P3 - Univ Ghent	P4 - UCL	P5 - Univ Tartu	P6 - Univ Brest	P7 - Univ Malta	P8 - Univ InHolland	P9 - Univ Turku	P10 - College Goldsmith	P11 - Univ Aveiro
Characterization	Informal	Interaction with society (enterprise, public administration, ...)	INTERSOC	++		+	++	+	++	++	++		+
		Cooperation - Coordination	COOP	++		+	++	+	+	++	+	++	+
		University culture	UNIVCULT	++		+	+		+	+	+	++	
		Various funding bodies	VARFUND	++			+	++	+	+	++		
		Response to individual objectives of students	INDIV	++			+	+	+				
		Increase accessibility to LLL	INCACC	++		+	++	+	+	++		++	++
		Mobilisation - Motivation	MOTIV	++			+		+	++		++	
		Recognition	RECOG	++		+	+	+	+	++		++	+
	Formal	University strategy	UNIV-STRAT	++		++	++	+		++	++		++
		Global HE strategy	GLOBSTRAT	+			+	+		+	++		
		Creating working groups	WORKGR	++			++	+		++	++	++	+
		Implementation plan	IMPPLAN	++		+	++	+		++	++		++
		Allocation contract	ALLOC-CONT	++		+	+	++		+	+		
		Academical reinforcement - Academic staff involvement	ACAD	++		+	+	++	+		+	++	+
		Specific council	SPEC-COUN	++		++		+			++		
		Mainstreaming - Holistic	HOLIS	++		+	+	+	+	+	+		
		Collaboration - Partnership	COLLAB	++		+	++	++	++	++		++	
		Research based	RESEARCH	+		+	+			++	+	++	+
Appearance of development steps	Analysis	Specialisation studies	SPECSTU	+		+	+	++		+	+	++	+
		Focus on research market	FOCRESMARK	+					+	+			
	Design	In regards of learning environment	LEARNENV	++		+	++	++		+	+	++	+
		Networks exploitation	NETEXPL	+			+	+		++	+	++	
		Monitoring and agree	MONIT	++		++	+						
		In putting Human resources	HR	+		+		+				+	
	Implementation	Professionalism, Pedagogic training (for teachers)	PEDTRAIN	+		+	++	+		++	+	++	
		Setting priorities	PRIOR	++		++	++			++	+		++
		Special units for LLL	SPECUNIT	++		++	+	+		++	+		++
		Special sub groups LLL in council	SUBGR			+					+		
		New services	NEWSERV	++			+	+	+	++	+		+
		Pedagogic innovation	INNOV	++		+	+	+		++	++	++	
		E-learning	ELEARN	++		+	++		+	++	+		
		Certification - Product range	CERT	++		++	+	++		++	++	++	+
		Internationalisation (Program, audience)	INTERNAT	+		+	++		+	++	+	++	
		Adapting supply - variety of services - Flexible training offer	VARIETY	++		+	++	++	+	++	+		+
		Recognition of informal and non formal learning	INFORM-LEARN	++		++	++	++			Added item	++	Added item
		University Regulation	UNIVREG	+			+	++					
	Evaluation	Institutional	EVALINST	++			++	+		++	+		
		Assessment report	ASSESREP	++		+	++	++		+			+
		External structure (private,	EXTERNAL										

The Tools and Techniques-Methods

why? Tools and Tech- niques	Meaning units	Codes	P2 - Univ Lille	P3 - Univ Ghent	P4 - UCL	P5 - Univ Tartu	P6 - Univ Brest	P7 - Univ Malta	P8 - Univ InHolland	P9 - Univ Turku	P10 - College Golds- mith	P11 - Univ Aveiro
Tools	Organisation chart - collaborative model - hierarchical structure	ORGCHART	++		++	+			+	+		++
	Special services to learners (support pgm, point for adult students)	SERVSTUD	++		+	+	++		+	+		+
	Independent structure for LLL	INDSTRUCT			++				++			++
	External funding	EXTFUND	++		+	+	+	++	++	++	++	
	Public allocation	PUBFUND	++			++	+		++	++	++	
	Cost model	COSTMOD	++		++		+		+	+		
	Mentoring system	MENTORSYS	++			++				+	++	
	Quality procedure	QUALPROC	++		++	+	+		+	++		++
	Executive board	EXECBOARD	++				+			++		
	Informal learning - RPL - APL	TOOLINFL	++		++	+	++		++	+	++	
	Observatory (Statistical data collecting)	OBSERV	++			++	+		+	+		+
	IT Support systems	ITSUPSYS	+		+	++		+		+		+
	Strategic plan	STRATPLAN	++		++	++	+		++	+	+	++
	Financial bonus to promote LLL	FINBONUS	++		+	+			+			
	SWOT Analysis	SWOT										
Techniques - Methods	Incentives for the involvement	INCENTIV	+		+					+		+
	Support services for the actors	SERVACT	++		+	++	++	+	++	+		++
	Structured course offering	STRUCTOFFER	+		++	+	++		++	++		
	Reinforce networking	NETW	+			++	+		++	+	++	+
	Multi-field approach	MULTIAPPR	+		++	++	+		++	++		++
	Budget control - management of costs - Self-supporting	MANAGCOST	++		++	+	+	+	++	++		
	Specific function related to project	SPECFUNCT	++			+	+					
	Triangle approach in practice	TRIAPPR	+			+			++	++		
	Create image for LLL	IMAG	++		++	++	+			+	++	++
	Mixed audience, group	MIXGROUP	++		++	+	++	+	+	+	++	
	Decentralised model	DECENTR	++		++	+	+			+		
	Monitoring quality	MONITOR	+		++	+			+	+		
	Long-term support	LTSUP	++				+			+		
	Comparison (national and international)	COMPAR	++		+	+	+					

The strategizing product Communication

How? Communi- cation on strate- gizing product	Meaning units	Codes	P2 - Univ Lille	P3 - Univ Ghent	P4 - UCL	P5 - Univ Tartu	P6 - Univ Brest	P7 - Univ Malta	P8 - Univ InHolland	P9 - Univ Turku	P10 - College Golds- mith	P11 - Univ Aveiro
Where	Alumni organisation	ALUMORG			+	+		+	++	+		
	Press - Media	PRESS				++	+	++				+
	Internal Newsletter	INTNEWS			+	++	+	++	++	+		++
	Scientific publications	SCIENTPUB			+				++			+
	Web site	WEB	+		++	++	+	++				
How	Broader discussion - round table con- sultations	BROADDISC	+			++	+		++	++	+	
	Embedded communication plan	COMPLAN				+			+			+
	Round tables for development of CE	ROUNDTAB	+			++	+		++	+	+	
	Events, conferences	EVENT	++		+	+	+	++			++	

Comparison between CS Analysis and Perception

The universities' perceptions have been compared with the analysis results of the case studies. The comparison is based on three dimensions: 1) the drivers to change (Why?); 2) the characterization of the strategizing process (How? formal or informal); and 3) the tools-methods used (How?). In order to highlight the main trends within each university the most relevant meaning units – i.e. (+++and ++) for the case study (chapter 6) and (++) for the perception (chapter 7) – are summarised in the following tables.

We observe that some individual perceptions for few items are slightly different from the results got from the transversal qualitative analysis based on the emerging meaning units and their occurrences in the self-assessment reports. It indicates that the relative items weights could vary from one person to another. But globally we can conclude that the saturation of the meaning units is gained. It means that the transversal analysis carried out on the 10 self-assessment reports is validated by the Universities perception in the sense that all the relevant items used in a LLL strategizing have been identified from the current material.

P2 - Univ Lille					
Why ? the internal and external drivers		How? Informal or Formal strategizing?		How? Which tools and methods?	
Case study	Perception	Case study	Perception	Case study	Perception
<ul style="list-style-type: none"> - Duty to society/ National vision ... (+++) - Legislation (National) (++) - Previous experience (++) 	<ul style="list-style-type: none"> - The same PLUS - Public finance - Economical situation or structure - Desire to improve access - Culture LLL - Necessity - Internal Cooperation 	<ul style="list-style-type: none"> - Balance of Informal and Formal - Response to individual objectives of students (+++) - Increase accessibility to LLL (+++) - Mainstreaming Holistic (+++) 	<ul style="list-style-type: none"> - All meaning units have been marked as in use intensively except two: global HE strategy and research based 	<ul style="list-style-type: none"> - Special services to learners (+++) - Triangle approach in practice (+++) - Public allocation (++) - Informal learning – RPL-APL (++) - Budget control (++) - Mixed audience (++) - Strategic plan (++) - Public allocation (++) 	<ul style="list-style-type: none"> - All meaning units have been marked as in use intensively or in use

P3 - Univ Ghent					
Why ? the internal and external drivers		How? Informal or Formal strategizing?		How? Which tools and methods?	
Case study	Perception	Case study	Perception	Case study	Perception
<ul style="list-style-type: none"> - Legislation (National) (+++) - Economical situation (++) - Culture of LLL (++) - Necessity & demand (++) 		<ul style="list-style-type: none"> Both, but a little bit more informal - Cooperation (+++) - Response to individual objectives of students (+++) - Global strategy (++) - Mainstreaming Holistic (+++) 		<ul style="list-style-type: none"> - Informal Learning – RPL – APL (++) - Decentralised model (++) 	

P4 - Univ Louvain-la-Neuve (UCL)					
Why ? the internal and external drivers		How? Informal or Formal strategizing?		How? Which tools and methods?	
Case study	Perception	Case study	Perception	Case study	Perception
<ul style="list-style-type: none"> - Duty to society (+++) - Europe position (++) - Desire to improve access (++) - Previous experience in LLL (++) - Necessity (++) 	<ul style="list-style-type: none"> Same elements PLUS - Internal cooperation as an internal driver 	<ul style="list-style-type: none"> More formal than informal - Increase accessibility to LLL (+++) - University strategy (+++) - Global strategy (++) - Specific council (+++) 	<ul style="list-style-type: none"> More formal: university strategy and specific council 	<ul style="list-style-type: none"> - Informal learning – RPL-APL (+++) - Budget control (+++) - Decentralised Model (+++) - Monitoring quality (+++) - Quality Procedure (++) - Multi-field approach (++) - Mixed audience (++) - Triangle approach (++) 	<ul style="list-style-type: none"> Same elements PLUS: - Collaborative model - Independent structure for LLL - Cost model - Strategic plan - Structured course offering

P5 - Univ Tartu					
Why ? the internal and external drivers		How? Informal or Formal strategizing?		How? Which tools and methods?	
Case study	Perception	Case study	Perception	Case study	Perception
<ul style="list-style-type: none"> Majority of internal drivers - Necessity (+++) - Previous experience in LLL 	<ul style="list-style-type: none"> All items have been marked and external ones - Legislation - Public finance - Duty to society - Markets- ... 	<ul style="list-style-type: none"> Balance of Formal and Informal - Cooperation (++) - Increase accessibility to LLL (++) - University strategy (++) - Academic staff involvement (++) 	<ul style="list-style-type: none"> A little bit more formal than informal: - Creation of working group - Implementation plan - Collaboration 	<ul style="list-style-type: none"> - Informal Learning – RPL-APL (+++) - IT support systems (++) - Strategic plan (++) - External funding (++) 	<ul style="list-style-type: none"> The same items PLUS: - Public allocation - Mentoring system - Observatory - Support services for actors - Multi-field approach

P6 - Univ Brest					
Why ? the internal and external drivers		How? Informal or Formal strategizing?		How? Which tools and methods?	
Case study	Perception	Case study	Perception	Case study	Perception
Mainly external drivers - Legislation (+++) - Duty to society (++) - Markets (++) - Economical situation (+/--)	The same external drivers, but previous LLL experiences is identified as the most important internal drivers.	Both, but more formal than informal: - University strategy (+++) - Collaboration (+++) - Interaction with society (++) - Mobilisation (++)	More formal: Allocation contract, academic staff involvement and partnerships are intensively used.	- Informal Learning RPL-APL (+++) - Reinforce networking (++) - Budget control (++)	The same items PLUS: - Support services for actors - Structured course offering - Mixed audience

P7 - Univ Malta					
Why ? the internal and external drivers		How? Informal or Formal strategizing?		How? Which tools and methods?	
Case study	Perception	Case study	Perception	Case study	Perception
Internal drivers more important than external - Desire to improve access (+++) - Legislation (National) (++)	All items have been marked as in use or in use intensively	Both informal and formal	Considered as more informal - Interaction with society - University culture - Various funding bodies - Response to individual objectives of students - Collaboration	No predominant tool or method (no meaning unit identified with +++ or ++)	- External funding

P8 - Univ InHolland					
Why ? the internal and external drivers		How? Informal or Formal strategizing?		How? Which tools and methods?	
Case study	Perception	Case study	Perception	Case study	Perception
More externally driven : - Duty to society (++)	A little bit more internally driven. - Legislation - Economic situation - Structural problem of funding - Desire to improve access - Previous experience in LLL - Culture of LLL - Necessity- demand	Both informal and formal - Interaction with society (+++) - Cooperation (++) - University strategy (++) - Academic reinforcement (++) - Collaboration (++)	Balance of informal and formal. Same items PLUS: - Increase accessibility to LLL - Mobilisation - Creating working group - Research based	No predominant tool or method (no meaning unit identified with +++ or ++)	- Independent structure for LLL - External funding - Public allocation - Informal learning – RPL-APL - Strategic plan - Support services for the actors - Structured course offering - Multi-field approach - Budget control - Triangle approach in practice

P9 - Univ Turku					
Why ? the internal and external drivers		How? Informal or Formal strategizing?		How? Which tools and methods?	
Case study	Perception	Case study	Perception	Case study	Perception
Balance of internal and external drivers - Duty to society (+++) - Change in internal organisation (+++) - Legislation (++) - Markets (++) - Culture of LLL (++) - Necessity - demand (++) - Internal cooperation (++)	More external drivers than internal. Same items for external drivers PLUS Public finance. Same items for internal drivers except culture of LLL and Necessity - demand	More formal than informal - University strategy (+++) - Creating working groups (+++) - Mainstreaming – Holistic (+++/-) - Research based - Interaction with society (+++) - Increase accessibility to LLL (+++)	More formal than informal. Same items PLUS: - Global HE strategy - Implementation plan - Specific council - Various funding bodies	- Special services to learners (+++) - External funding (+++) - Reinforce networking (+++) - Multi-field approach (+++) - Triangle approach in practice (+++) - Public allocation (++) - Cost model and budget control (++) - Informal learning RPL-APL (++) - Observatory (++) - Strategic plan (++) - Support services for the actors (++) - Monitoring quality (++) - Long-term support (++)	Same items PLUS: - Quality procedure - Executive board - Structured course offering

P10 - Univ College Goldsmiths					
Why ? the internal and external drivers		How? Informal or Formal strategizing?		How? Which tools and methods?	
Case study	Perception	Case study	Perception	Case study	Perception
Externally driven - Duty to society (+++) - Demography (+)	Internally driven - All internal drivers except the University structure are marked Same external drivers PLUS: - Public finance - Structural problem of funding	More Formal than informal - Global strategy (+++) - Collaboration (+++) - Interaction with society (++)	More informal than formal - Cooperation - University culture - Increase accessibility to LLL - Mobilisation - Recognition - Creating working group - Academic reinforcement - Research based	- Reinforce networking (++)	Same PLUS: - External funding - Public allocation - Mentoring system - Informal Learning RPL - APL - Create image for LLL - Mixed audience

P11 - Univ Aveiro					
Why ? the internal and external drivers		How? Informal or Formal strategizing?		How? Which tools and methods?	
Case study	Perception	Case study	Perception	Case study	Perception
Balance of internal and external drivers, but a little bit more internal - Duty to society (++) - Desire to improve access (++) - Internal cooperation (++)	Same conclusion. Same items PLUS: - Change in internal organisation	More informal than formal: - Interaction with society (++) - Mobilisation (++) - Collaboration (++)	More formal than informal. Same items PLUS: - Increase accessibility to LLL - University strategy - Implementation plan	No predominant tool or method (no meaning unit identified with +++ or ++)	- Organisation chart - Independent structure for LLL - Quality procedure - Strategic plan - Support services for actors - Multi-field approach - Create image for LLL

Transversal analysis of LLL strategies – content

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Introduction

The qualitative transversal analysis on LLL Strategy focuses on the content of the different ULLL strategies developed by the 10 consortium partners. It is mainly an in-depth interpretation, organisation and comparison of their differences and similarities. This is in order to identify common elements, which play a significant role in the elaboration of ULLL strategies and which might be transferable to other universities eager to improve their LLL strategies.

Like the analysis on the strategizing process, this analysis used the questions of the Strategy-as-Practice approach developed by Whittington (Whittington, 2003, pp. 117-125) as a point of departure for formulating new questions focusing on the content of LLL strategies, concerning vision, motivation, values, challenges and implementation perspectives.

On the basis of these new questions the content of the cases studies collected from the ten universities members of the ALLUME partnership was reorganised by one researcher in grids¹⁷.

The “rewritten” versions of the cases studies were validated by presenting them to the ten partners in order to receive their feedback, comments, reactions, provision of additional information and finally their agreement. Then the revised versions were analysed transversally trying to spot what elements were common or different from one university to another in order to identify:

- What were the elements playing a significant role in the elaboration of a strategy or elements contributing to the preparation of a strategy in each university?
- What key issues could be part of guidelines for other universities?

In this way, we have structured the strategy content analysis on 5 following items:

1. Vision, motivations and values
2. Challenges and Objectives
3. Organisation
4. Discussions about LLLU strategy – Paths to change
5. Implementation perspectives and Required Conditions on Pathways

It is outlined that the analysis structured on these fixed items identifies some similarities between universities strategies but also shows significant differences between them. **It therefore suggests different models of potential or real implementation of LLL strategies in universities.**

¹⁷ For the different grids, please see <http://allume.eucen.eu/documents> (last accessed on 27/10/2011)

1. Vision¹⁸, mission¹⁹, motivation and values

Regarding the missions, motivations and values we observe more common commitments reflecting an evolution of the conception and the role of universities in the society:

- The 10 universities underline the evolution of the traditional **missions** of the university tending to provide better services to individuals (of all ages), to companies and to the society in general. Leading role in implementing a knowledge based society and contributing to a sustainable development
- The **motivations** are mainly to contribute both at the development of individuals and society and the adoption of a more learner centred approach
- The **values** are based on the responsibility of the University: to build citizens free, able to progress, to face new challenges and to contribute to the society, to implement quality culture and sustainability.

In the following diagram we have tried to link all together the different elements collected. We come finally to the identification of four types of institutional positioning regarding LLL strategies:

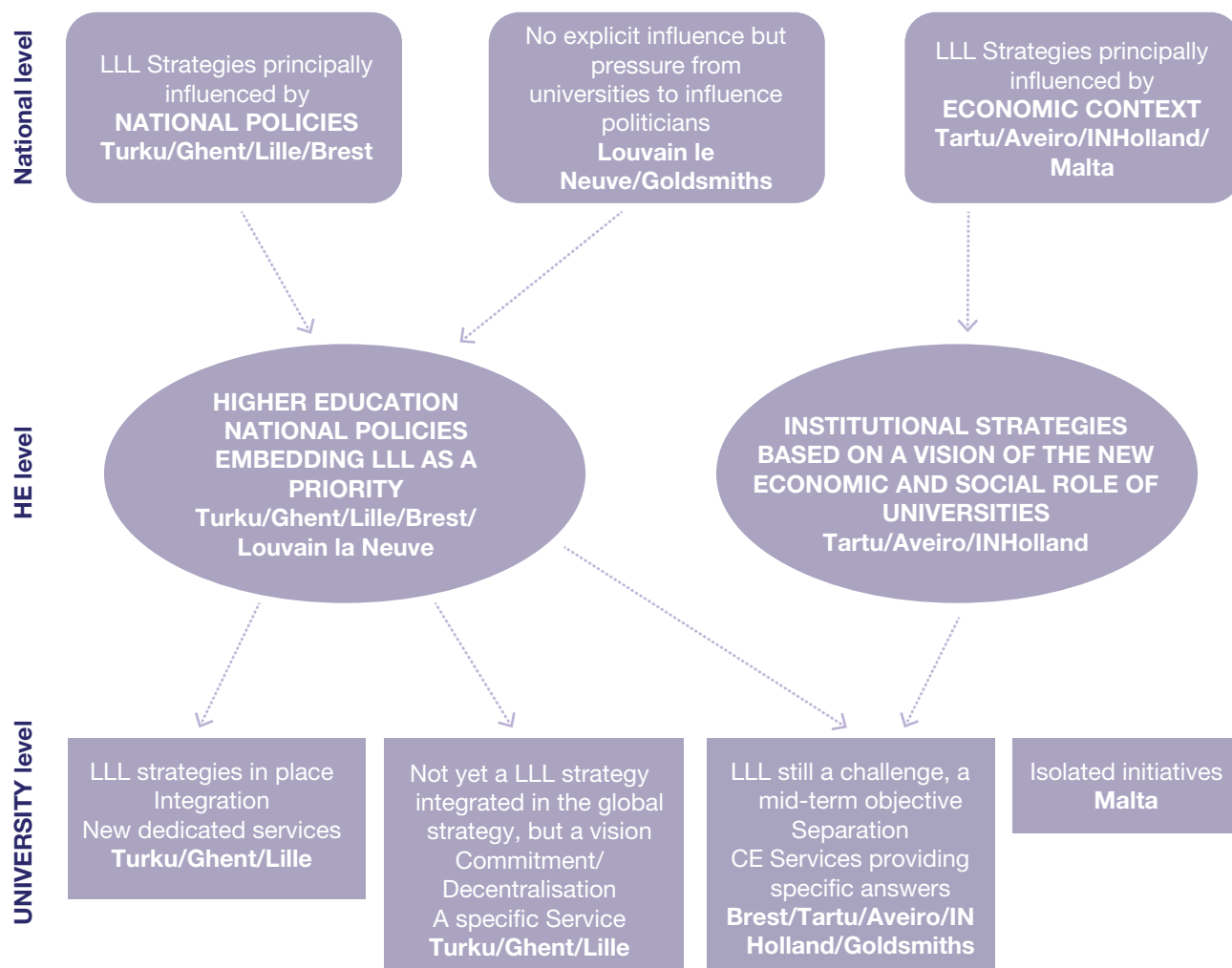
- Universities where LLL strategies are more or less in place, aiming at an integration of initial and continuing education and offering new services trying to meet the needs of more diversified learners;
- Universities having not yet an explicit strategy but having a vision of the future, showing intentions, exploring different approaches. They demonstrate a real commitment but delegate to a specific internal Service the mission of convincing people and implementing the process.
- Universities where to define and to put in practice a LLL strategy is still a challenge, a mid-term objective. They have discussions, some take initiatives but without real impact. For the moment they entrust Continuing Education Services with this mission asking them to provide the relevant answers.
- And finally, Universities reporting only on isolated initiatives taken at Faculty level or individual level;

During the dissemination meeting in Barcelona, participants mentioned a fifth situation with universities where nothing is happening or where the top management of the university is against this perspective giving priority to traditional missions of the University, and principally to research.

¹⁸ **Vision:** Defines the desired or intended future state of the institution in terms of its fundamental objective and/or strategic direction in a long term view.

¹⁹ **Mission:** Defines the fundamental purpose of the institution, basically describing why it exists and what it does to achieve its Vision.

**Diagram 1: KEY FACTORS INFLUENCING LLL STRATEGIES IN UNIVERSITIES/
IMPACTS ON UNIVERSITIES/ARTICULATION OF THESE KEY FACTORS**



Challenges and Objectives

It is worth noting that despite the different visions expressed by the 10 universities, they mention more or less in the same words the key challenges that universities have to face now:

- To meet the needs of both individuals and society is the most important challenge. This means that universities have to increase narrow relationships with their environment and to elaborate new policies and provide new services both to the individuals and to the society.
 - This will oblige universities to develop student centred provision and arrangements.
 - To provide new Services for mature students, for instance LLL guidance, or recognition of formal, non formal and informal learning.
- This means: to increase diversification and flexibility of programmes and to give more space to multidisciplinary.
- This requires a need to develop a culture of quality and to organize staff development and management

We have tried to combine and organize these different elements in the following diagram

DIAGRAM 2: Challenges and Objectives



Organisation

The institutional organisations presented in the case studies reflect the evolution of traditional UCE Services in universities. We observe three types of organisations:

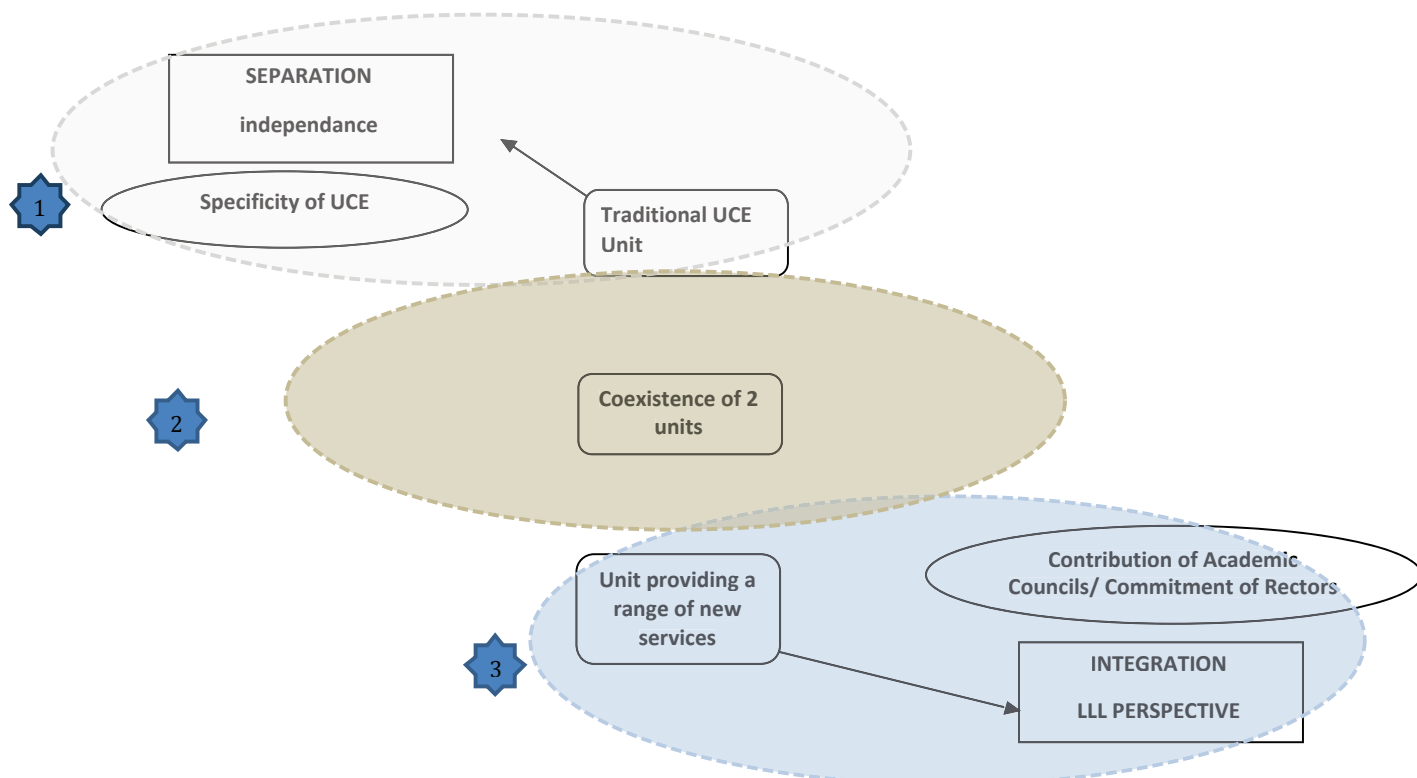
- UCE “traditional” Services, acting as separated units, but diversifying the services provided and enlarging their range of offers;
- Co existence of 2 units(for instance in Tartu and Aveiro): one more in charge of traditional UCE (short courses, certificates, specific programmes for adults,...) and one now in charge of access and participation of mature students in academic programmes, those we call the “returners”;
- Units offering a range of services to adults or mature students in a LLL perspective.

The two first types of organisation are more in a logic of separation, the third one in a logic of integration. But the landscape is becoming more complicated due to the multiplication of actors involved. If until recently continuing education was not in general incorporated in the core activity of the university, now this separation is less clear. New issues and discussions about organisation appear:

- Centralisation vs decentralisation. Universities having already a LLL strategy encourage decentralisation, helping faculties and internal departments to develop their offer in direction both of young and mature students, both in academic programmes and in short training sessions. Centralisation concerns quality assurance, coordination of programmes and new services to learners.
- Articulation between units. In universities having established two units in parallel (one dedicated to academic programmes and one dedicated to short training sessions) the challenge is to establish coordination between the two units in order to create conditions making possible a LLL strategy
- The increasing role of Councils in designing LLL policies at university level(Turku, Ghent, Lille, Brest, Louvain la Neuve, together with the commitment of Rectors (Turku, Lille, Brest, Louvain la Neuve, Aveiro). We are progressively moving from a peripheral vision and conception of UCE to a more central approach based on the elaboration of a LLL strategy.
- Integration:

The integration of initial and continuous education in a LLL perspective is based on the combination of two factors: decentralisation (responsibility of programmes and “products placed on faculties and internal departments) and provision of new services dedicated to reception and access, guidance and counselling validation of formal, non formal and informal learning

- Staff development: increasing role of these units in the elaboration and promotion of training programmes for staff playing a role in UCE and LLL

Diagram 3. IDENTIFICATION OF 3 TYPES OF LLL ORGANISATION

4. Discussions about LLLU strategy – Paths to change

The discussions in universities arise in reality key questions for the future and to measure the chances for implementation of LLL strategies. We identified in cases studies three levels of discussions on the implementation of LLL strategies.

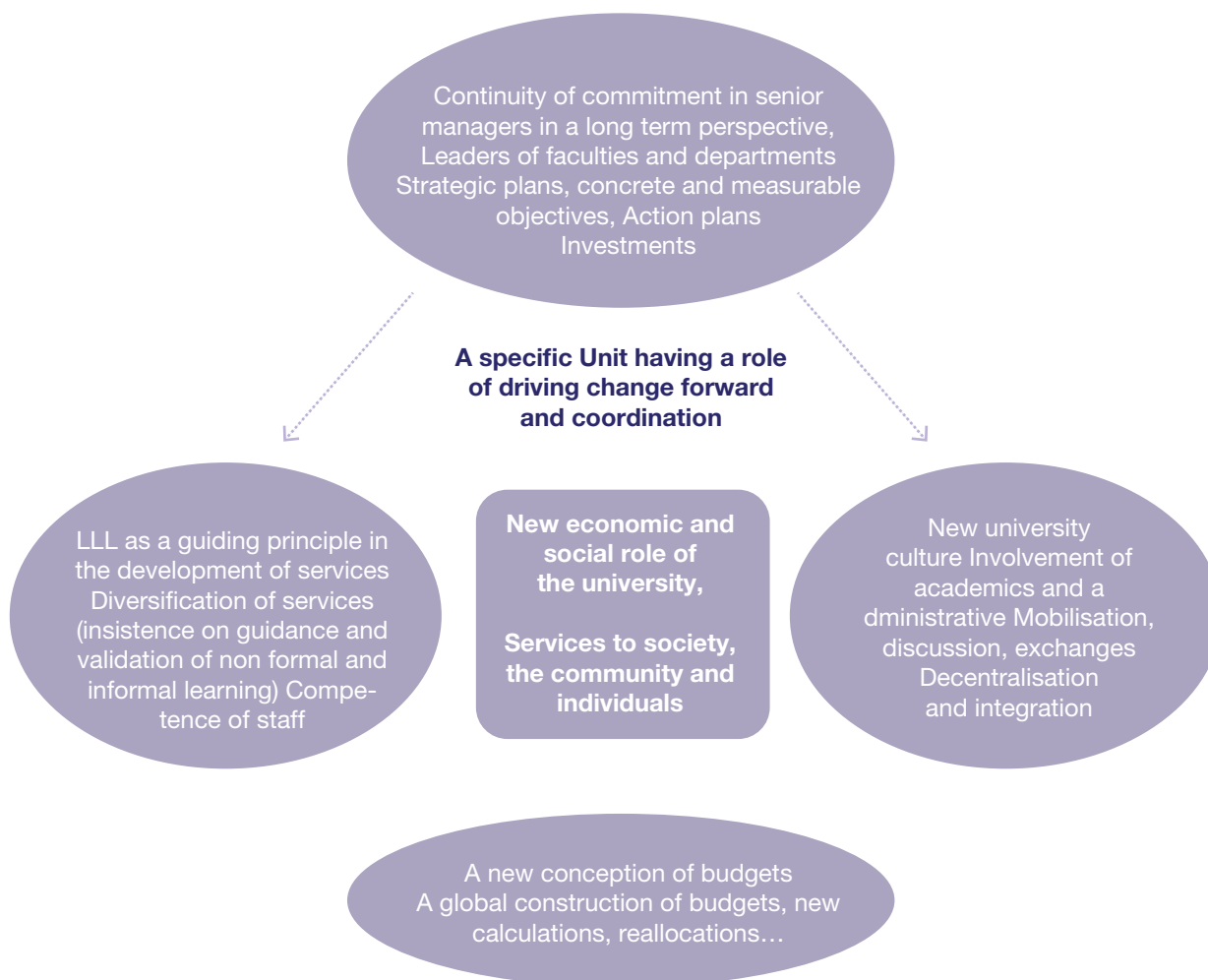
- A first group underlines the necessary change in university culture:
 - The LLL perspective introduces a new level of complexity in universities: they have to think globally their educational strategy, to consider initial education and continuing education as a unique process (it is still a challenge), to promote cooperation instead of competition, to be more committed with services provided to learners
 - Universities have to set up a new equilibrium between their traditional missions
 - Some progresses have been registered in universities having taken time; open the floor to discussions and debates, developed experiments.
 - To think from the beginning of the reflection: sustainability (institutional dimension, not individual dimension)
- The second group present a list of problem that have to be solved before or conditions to be met
 - Lack of awareness of colleagues
 - Overcome resistance from colleagues
 - Lack of interest or commitment from the top management, LLL is not a priority
 - Lack of technical resources, of engineering competences
 - Competition with other missions
 - To put together local or individual initiatives
- Third group: funding as a pre condition
 - Necessity to set up a new funding model
 - Despite the crisis

5. Implementation perspectives and required conditions on pathways

The transversal analysis of current best strategic developments in universities identifies eight conditions to meet:

- A shared vision of the future: the new economic and social role of universities: services to the society, the community, the individuals
- Sustainable commitment of top managers, of heads of faculties and departments, existence of strategic documents, plans,...
- A strong specific Unit having a role of impulsion and coordination
- LLL as a guiding principle in the development of Services to the learners
- Diversification of Services, priority given to guidance and counselling
- Competence of staff
- Creation of a new culture by communication, discussions and debates
- Decentralisation and integration

We have tried to organize these priorities in the following diagram

Diagram 4 REQUIRED CONDITIONS FOR A LLLU IMPLEMENTATION

Conclusion

This transversal analysis of the cases studies shows different levels of implementation among our partnership, but also different ways in developing a LLL strategy. There is not a single way; universities are likely to use different methods and tools. A single model for all does not exist but different approaches linked to the university vision and objectives, to the economic and social environment, to the internal and external actors, to the influential partners, to funding, to regulations, etc.

We have identified, on the basis of the institutional vision and of the national policy dimension four types of LLL strategies which lead to different organisations ranging from separation to integration.

However some key elements appear and are common to all partners:

- the objectives and the expected results;
- funding and the necessity to elaborate a new funding model in each institution;
- the university culture change, moving from an academic vision to a conception of the new role of university offering services to the society, the community, the individuals based on research (“societal interaction with research and education”);
- the identification of similar problems that colleagues have to meet in order to try to promote a LLL strategy in their respective institutions.

Another key element seems to be the necessity of provision of new services, more dedicated to guidance, counselling, mentoring, validation of non formal and informal learning.

Universities need to create dynamic units in charge of the implementation and the coordination of all these new approaches and activities, as appropriate. This is because all the partners think that the only chance Universities have to be successful in LLL is to mobilise Heads of faculties and departments and other relevant colleagues, combining a centralised piloting and “local” and individual responsibility. This also requires monitoring and updating the defined strategy taking into account the results, and the unit’s ability to anticipate the environment’s evolution.

4

Annex

1. Lifelong Learning - An Overview

1.1 Introduction

In 2001 the European Commission, and in 2002 the Council Resolution on Lifelong Learning, both stressed the importance of Lifelong Learning for competitiveness and employability, but also for social inclusion, active citizenship and personal development. In many countries Lifelong Learning is one of the key aims of educational policies and it should help to improve both economic growth and social cohesion. Fostering Lifelong Learning is seen as a way to raise the educational level of individuals and to keep their knowledge and skills updated.

Generally speaking, Lifelong Learning is about making use of personal competencies and about the result - the outcome - of learning (Duvekot et al, 2007). People are always learning everywhere, and above all, not always in a conscious or self-chosen learning situation. However, the degree to which individuals and the knowledge society consciously build on these learning processes and outcomes is still strongly underexposed and under-utilised.

Even though references to Lifelong Learning are quite common in educational policies, the concepts of Lifelong Learning are rather ambiguous. Lifelong Learning can vary from adult education and permanent and further education to informal learning and Valuation of Prior Learning. It can take place in all kinds of learning contexts. Due to the intricacy of Lifelong Learning, it still remains unpredictable to what extent it is changing and will change the role of education and especially of universities.

As education comes together with validation / accreditation measured by the output of education, Lifelong Learning comes together with lifelong valuing (APL, APEL, RPL, VPL) measured by the outcome of all learning and the impact on work and society.

1.2 What is Lifelong Learning?

The concept of Lifelong Learning predates the upsurge of interest in the late 1960s and early 1970s (Field, 2001, in Borg and Mayo, 2006). Ettore Gelpi, one of the major exponents of the Lifelong Education philosophy of the late 60s and 70s, states: “My thinking is that lifelong education, fundamentally, belongs to the history of education of all countries; it is not therefore a new idea. It lies in the Chinese tradition, in Indian Buddhism; it lies within Greek Philosophy and within the spirit of the European Renaissance. The real revolution today lies in the popular demand for lifelong education, not in the idea itself” (Gelpi, 1985, p.18).

Lifelong Learning, as promoted since the late sixties, has a history of association with the massification and the democratisation of access to education. In fact, UNESCO’s concept of Lifelong Education of the late sixties was promoted as part of its “Education for all” campaign (Tuijnman and Boström, 2002). The literature covering the history of Lifelong Learning in the last fifty years indicates that a critical reading of compulsory education as well as the politics of social justice and social cohesion have consistently informed Lifelong Learning.

A more recent development is the economic turn to Lifelong Learning. This is associated with a world economic system that is characterized by the intensification of globalization and the consequent emergence of a market-oriented stance to education (Borg and Mayo, 2006).

Another development in the last decade is that the learner is central in the learning process and that Lifelong Learning means much more than lifelong education only. The EU, in the adapted Lisbon Strategy (2005), followed the more economic approach and the personified character of learning formulated by the OECD in 2004:

- Lifelong Learning approaches the demand for and the offer of learning opportunities as parts of an integral system that includes the whole personal lifecycle and all forms of learning.
- Central point is the learner: demand-driven learning to fulfil the need for learning by the individual.
- Motivation for learning by the individual is central: learn to learn.
- Learning has more than one goal, from personal development and acquiring knowledge to economic, social or cultural targets.

The definition for Lifelong Learning given by the European Commission is²⁰:

‘Lifelong Learning’ means all general education, vocational education and training, non-formal education and informal learning undertaken throughout life, resulting in an improvement in knowledge, skills and competences within a personal, civic, social and/or employment-related perspective. It includes the provision of counselling and guidance services.

Lifelong Learning is a relatively new term in the educational field and, because of this, there are various competing definitions. Often these definitions are specific to their cultural, political and economic context, and this has caused difficulties in generating a theory of Lifelong Learning and subjecting it to academic and scholarly rigour or even (to go one step further), changing this rigour. It may be that the emphasis is on the economic aspects of Lifelong Learning, with the most important element considered to be the professional updating of workers in order to maintain competitive edge in the global marketplace. This restricts Lifelong Learning to the period of time “when someone is in the workforce”. On the other hand the emphasis could be on the social and cultural aspects of Lifelong Learning, with the most important element being personal development. This implies that Lifelong Learning can be “from cradle to grave”. These competing areas of focus have led to many different subsets, such as “intergenerational learning”, “third age learning”, “formal, informal and non-formal learning”, “accreditation of prior learning”, “citizenship”, and so on.

Universities are not immune to local and international developments and the ideologies they generate. Notwithstanding the dominant economic discourse that permeates education provision internationally, the Lifelong Learning University continues to emphasise participation and community. These two principles will be manifested by more possibilities to participate in the activities of the University, and thus develop capabilities and know-how.

The needs of the community will also be taken into account in the development of curriculum, teaching and assessment. The Lifelong Learning University will therefore ensure democratic access to learning and assessment, be multi-culturally aware, and be prepared to value and validate other forms of learning and knowledge which was gained elsewhere. In this way it will encourage respect for all learning and also contribute to the reduction of social and cultural exclusion.

²⁰ Decision No 1720/2006/EC of the European Parliament and of the Council of 15 November 2006: establishing an action programme in the field of Lifelong Learning

It is now widely accepted that universities are major actors in this Lifelong Learning trend, that Lifelong Learning is at the heart of their mission, and deriving from this, that they require a set of policies and strategies to make this a reality. The greatest gains in this endeavour can be made when there is a generally accepted definition of University Lifelong Learning, and the definition which is the most useful is called the BeFlex definition:

University Lifelong Learning is the provision by higher education institutions of learning opportunities, services and research for: the personal and professional development of a wide range of individuals – lifelong and life wide; and the social, cultural and economic development of communities and the region. It is at university level and research based; it focuses primarily on the needs of learners; and it is often developed and / or provided in collaboration with stakeholders and external actors. (Davies, 2007, p. 35)

In addition the Recognition of Prior Learning in all contexts in life must be taken into consideration.

2.The Cost and Benefits of Lifelong Learning

Lifelong Learning brings real tangible benefits which appear across a wide range of stakeholders and exists despite the costs involved. Some examples of these benefits are explained below.

2.1 The Benefits for the Individual

As stated in the definition of the European Parliament Lifelong Learning is important for competitiveness and employability, for social inclusion, active citizenship and personal development. Lifelong Learning offers the opportunity of continuous development, thus increasing the capability of the individual to adapt to the ever changing demands of society. Also Lifelong Learning keeps the individual (potentially) interested in a wide range of aspects of knowledge, and utilising the knowledge. It keeps him/her in contact with others, working and thinking in the same fields of interest.

2.2 The Benefits to the National Economy

The development of Lifelong Learning is interwoven with the knowledge based economy and society. It is an even more urgent need in the networked economy, in which knowledge is continuously exchanged and updated to meet the demands of the ever increasing speed of change. Aims such as flexibility, sustainable employability, and participation require Lifelong Learning.

In the knowledge age it is vital that a guiding principle should be universal and continuing access to learning. Only in this way can there be a sustained participation in the knowledge economy. Lifelong Learning should therefore promote employability, because, for much of people's lives, having paid work underpins one's sense of independence, well-being and self-respect. Thus, education and training throughout life will help to maintain economic competitiveness and employability.

Workers, at all economic levels, will benefit from having access to the latest knowledge and skills in a fast-changing society. It is therefore important that universities develop their programmes for professional updating, widening participation and increasing the democratic access to knowledge. This approach will mean that workers do not suffer economic and social exclusion because of skills becoming redundant.

2.3 The Benefits to Society

It may be felt that if there is an exclusive concentration on Lifelong Learning as the constant upgrading of skills for employment or of a narrow stream of knowledge, there is the danger that those who are not in at the start

of the journey will remain excluded. There is the danger that a knowledge society will not be an understanding society. Because of this, it is felt that Lifelong Learning promotes also active citizenship, where people can participate in all spheres of social and economic life, and thus feel that they belong to their society and that their society belongs to them. Societies should place value on a vigorous intellectual and cultural life, and any Lifelong Learning strategy should make this perfectly clear.

2.4 The Benefits to Your Institution

A Lifelong Learning University will have strong links with industry and society, working with different networks and with many partners. This will enmesh the University in the surrounding world, ensuring that it participates fully in the needs and aspirations of its region and that region's people. It will reach out to individual adults, other education providers and learning organisations, businesses, employers and workers associations. The university will be a welcoming place with many mechanisms for bringing people inside.

Lifelong Learning will also widen the student pool and allow for a greater mix of backgrounds and ideas. A Lifelong Learning University will also demonstrate the transfer of intellectual capital in new ways, including into the institution from the community. Many universities are inward looking, bound by incomprehensible rules and regulations: the Lifelong Learning University has to be outward-looking, have an external focus, and be very flexible.

Commitment to Lifelong Learning also means that also the university itself needs to become a Lifelong Learning organisation, which means that all employees (management, researchers, teachers, supporting staff) should embrace Lifelong Learning for themselves in order to continuously participate and contribute in the development. This may lead to new focus on a university; for example, the performance of staff may be measured less by the output of scientific documents (academic driven) and more by the outcome of applying the new knowledge and participating (society / market driven).

2.5 The Costs of Lifelong Learning

When speaking about costs of Lifelong Learning, it has to be borne in mind that the complexity and the variation in possible solutions for Lifelong Learning make it almost impossible to oversee all costs and to make a reliable prediction.

Some examples for possible options of Lifelong Learning in respect to the diversification and transformation of curricula are enumerated below to illustrate the diversity of possible actions:

- Working with adults means accepting that most of them have already increased their knowledge elsewhere and that this knowledge is often specialised. The normal broad, general curriculum, which prepares students for a range of jobs in the future will not suit someone working and on-the-job learning in the field of research for many years.
- Learning next to a job asks for a huge commitment. Many of those beginning academic study stop their study after a while. 'Made-to-measure' modules have to be developed and offered.
- E-learning is not always the best solution. New forms of blended-learning have to be developed.
- Many teachers / researchers may be sceptical of another new development and of the new efforts they have to make to adapt their work for Lifelong Learning, including in their own Lifelong Learning process.

Despite the complexity of Lifelong Learning, the Foundation for Economic Research (SEO) in the Netherlands made an overview of benefits and costs of Lifelong Learning in 1997. At that time the idea of Lifelong Learning was mainly restricted to training courses for adults. The definition of Lifelong Learning is nowadays much broader and the overview has to be adapted to the new focus on Lifelong Learning.

Some of the costs involved are listed below.

For the individual Lifelong Learning means often that the costs (financial, loss of spare time) are borne by the person; Lifelong Learning is a long term investment which still gives no guarantee for a job, and even the learning becomes obsolete. Lifelong Learning also puts mental pressure on the participating individual, but might give non-participants a feeling of dropping out or being left behind. Much learning is done informally; if universities are not able to formally recognise all the academic learning done in contexts outside the university, the additional costs of education will remain, and the individual will feel disrespected and not recognised.

For the employers Lifelong Learning means cost in the form of fees for education and training, the loss of productivity and absenteeism (during training), the risk of losing the better developed employee, and an increase in wages.

For universities the costs lie in the development of new financial models, new strategy development and implementation, (re-)organisation, training and development of staff (management, researchers, teachers, supporting), the development of new pedagogical and didactical models, working with a higher variety of students, new recruitment systems (targeting at adult groups), adapting the quality system, adapting / renewing the validation system (APL, RPL, VPL).

And at government level the cost of Lifelong Learning may lie in paying subsidies for development, implementation and continuation of Lifelong Learning, in tax exemptions given to the individual and / or the employers, and possibly in unrest in the educational system.

The costs are a brief and general overview and might differ per country (different learning cultures and systems, tax systems, policy, etc) and per university (choices of Lifelong Learning model, number of students, field of education, demand, etc.). Also due to the increasing speed of change in the labour market, the relatively slow movement of education and the huge complexity in the environment of Lifelong Learning there are no general economic models to predict clearly the benefit and costs of Lifelong Learning as described in the definition. Nevertheless, some of the factors mentioned above have to be taken into consideration when working on university Lifelong Learning strategies.

of the journey will remain excluded. There is the danger that a knowledge society will not be an understanding society. Because of this, it is felt that Lifelong Learning promotes also active citizenship, where people can participate in all spheres of social and economic life, and thus feel that they belong to their society and that their society belongs to them. Societies should place value on a vigorous intellectual and cultural life, and any Lifelong Learning strategy should make this perfectly clear.

2.4 The Benefits to Your Institution

A Lifelong Learning University will have strong links with industry and society, working with different networks and with many partners. This will enmesh the University in the surrounding world, ensuring that it participates fully in the needs and aspirations of its region and that region's people. It will reach out to individual adults, other education providers and learning organisations, businesses, employers and workers associations. The university will be a welcoming place with many mechanisms for bringing people inside.

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