

CASE STUDY: FINAL VERSION

Version of Kari Seppälä (University of Turku, FI)

Visited by Karine Janssens (University of Ghent, BE)

University of Turku Factsheet

University Title	Turun yliopisto/University of Turku
Location/country	Finland
Public or private	Public
Year when the institution was founded	1920
Number of overall students of the institution	20 773 (2009)
Degree/non-degree	17326
Number of academic/research and non-academic/administrative staff	over 3000
Number of faculties	7
Kind of degrees offered (if possible including EQF)	BA, MA, PhD
Date of the Case Study	30.8.2010

University-specific best practices in relation to the 10 Commitments

Commitments	Best practice from your university's Case Study, if applicable
1 Embedding concepts of widening access and lifelong learning in their institutional strategies	Chapters 3, 4 and 6
2 Providing education and learning to a diversified student population	9
3 Adapting study programmes to ensure that they are designed to widen participation and attract returning adult learners	not in the case study, other material available
4 Providing appropriate guidance and counselling services	9 Support services

*The case studies have been written in English by non-native English speakers and, in order to retain the original voice of the partners, they have not been edited.

5 Recognising prior learning	not in the case study, other material available
6 Embracing lifelong learning in quality culture	4 “Applying for the national quality label of a University of excellence in adult education”
7 Strengthening the relationship between research, teaching and innovation in a perspective of lifelong learning	3 The profile of the University of Turku Research-based teaching and lifelong learning <i>Competitive Research</i>
8 Consolidating reforms to promote a flexible and creative learning environment for all students	not properly in the case study, other material available
9 Developing partnerships at local, regional, national and international level to provide attractive and relevant programmes	3 <i>Science in the service of society</i> 4 6 c) The strategic plan of the Centre for Extension Studies for 2010 – 2012
10 Acting as role models of lifelong learning institution	3, 8

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1. Basic Information

Institution: University of Turku

Country: Finland

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2. Brief Analysis of the Case-Study process

By the end of March, the University fixed the internal organisation of ALLUME and produced a draft for the case study. Director Kari Seppälä was responsible for the writing of the case study. Project Coordinator Ari Koski collected data for the final version. The case study and the SWOT analysis were discussed in the Management Team of the Centre for Extension Studies. We plan to continue the process in the autumn under the new Teaching Council of the University that started its work in March 2010. The Council set up a subgroup for Lifelong Learning/Adult Education 11.6.2010.

We planned to carry out the Case-Study Process efficiently with the key expertise, whereas we wanted to involve a wider group of University colleagues in the discussion for the SWOT-analysis. The timetables of

the University postponed the wider analysis to the autumn of 2010. The analysis of the steps of the lifelong learning path of the University was certainly educative, but the resources of the ALLUME project did not give us the chance to make full use of the material that we collected about the history and activities of lifelong learning in the University.

3. Lifelong learning strategy

In the strategic process of 2009, the University decided not to produce a separate lifelong learning strategy, but *embedded lifelong learning in the relevant chapters of the main 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. The recent strategic process made use of concepts like ‘vision’, ‘mission’ and ‘goals’, but the strategy is structured in line with the academic logic of research, education and social interaction.

This part of the ALLUME report is written on the basis of *the new University Strategy for 2010 – 2012* that was approved by the University Board 14. December 2009. The main messages in relation to lifelong learning are extracted from the strategy that will be available in its entirety in English in the near future. The goals were determined in the implementation plans of the strategy that are discussed in Chapter 5.



UNIVERSITY LLL PRINCIPLES (UT)

Two expressions of ULLL

1. A principle in all university education
2. Special services for adults

Responsible for ULLL

- University leadership
- Faculties and institutes
- ULLL special units

ULLL essence

- Research based
- Multidisciplinary
- Student orientation
- Individual pathways
- Learning outcomes
- Lifewide
- Worklife relevance

The Strategy of the University of Turku: Lifelong learning in a nutshell

The profile of the University of Turku

The new University of Turku, which was created when the University of Turku and the Turku School of Economics and Business Administration merged, is *an internationally competitive research university*, the foundation of which is in high-quality multidisciplinary research. The University promotes free research and academic culture and gives research-based teaching at the highest level.

The University that was founded by individual citizens emphasizes its *cultural and scientific role as a responsible actor in society*. The basic values of the University are ethicality, criticalness, creativity,

openness and communality. The openness is manifested in the open cultural practices and the scientific unprejudiced attitude. The university is open to different scientific approaches, methods and outcomes. The openness is also commitment to the dissemination of new knowledge to the society. The main principles of education are the connection to scientific research and the principle of the lifelong learning.

Research-based teaching and lifelong learning

The most relevant chapter in the University strategy concerning the ALLUME interests is entitled “*Research-based teaching and lifelong learning*”. It includes the “vision” and “mission” of lifelong learning in the University although the concepts themselves are not used. The ‘vision’ is a definition of the ideal of ULLL and the University’s commitment to enhance it. The ‘mission’ describes the key activities and the most relevant development paths.

“The vision”

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. A special feature of the University of Turku is to connect know-how in business economics and ability to anticipate future trends into expertise in various scientific disciplines.

The University emphasises *participation and communality*. These principles are manifested as equal possibilities to participate in the University activities and to develop capabilities and know-how diversely. Participation stands also for taking into account the needs of the community in the development of curriculum and teaching, ensuring access to learning and sensibility to identify the demands by the multicultural context. The University ensures all students the possibility for sufficient personal study and work life guidance.

The principle of the *continuum of lifelong learning* signifies the possibility to gain science-based education and support for professional development throughout the career. The University realizes the principle by supplying the society with scientific knowledge and training teachers at a high scientific level for the whole education system.

“The mission”

The University produces *services of lifelong learning* for the adult population. These cover open university, continuing professional education, executive education, specialization studies and linked development projects. The services construct a meaningful coordinated entirety.

Requirements for learning besides work are advanced with the offer of *the open university* and guidance. 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. The University will make use of its widened expertise in business economics through diversification of services for experts.

The student recruitment allows for multifaceted and international groups of applicants.

Students' general skills are nurtured with networked and technologically developed approaches and field-specific courses in working-life skills. Connections to domestic and international work life, alumni and other stakeholders build up *the relevance of education for working life*.

Pedagogic training will be improved to match with the needs of the University community and the society. The importance of pedagogic education, know-how and skills, language proficiency and merits in the development of teaching in the recruitment of teachers will be strengthened.

The University underpins the implementation of lifelong learning with *research and development* activities. The learning environments and recognition of prior learning are in focus.

Relevant statements in the other chapters of the strategy

Competitive Research

In the strategy, the University recognises nationally and internationally competitive areas of research. Direct strategic investments are planned to support them. *One of the research profiles is learning and education*. It focuses on the children's, adolescences' and adults' cognitive, emotional, social and cultural conditions of learning as well as the institutions of education and lifelong learning. Skills in languages and mathematics, social control of learning, fellow relations and social well-being of children and adolescence, bullying, the higher education system and relations between education and working life are important areas of research.

Science in the service of society

The University that was founded by individual citizens emphasizes its cultural and scientific role as a responsible actor in society. *Interaction with society is an integrated component of the basic task of research and teaching*. All University units and members of the University community participate in the interaction with variable intensity. Resourcing and career development will take into consideration the results.

The constant interaction with enterprises, public administration and the third sector will improve the quality and effectiveness of research and teaching. *The cooperation becomes concrete* in service research, the utilization of research outcomes, the working life relevance of the degree education, the exportation of expertise, alumni cooperation. lifelong learning services and regional development projects.

The University will clarify *the steering system* of the interaction and strengthen the necessary measures of support.

Reasonable *individual learning pathways* for both degree and adult students will improve the working life relevance of education. The University and its units will exploit the expertise of the alumni and networks.

A clear picture of the University expertise and services is a precondition for fruitful cooperation with the region and the subregions. In the University, the interaction demands *capacity to work at the interface* both in research, teaching and development. The University will build up the operational preconditions of the networks and look actively for the new solutions of interplay.

Success factors – human resources

The University of Turku is *a learning community* with common values. Following the principle of lifelong learning, the University encourages its staff into learning and the development of work. Each employee is an important element in the whole and the expert in his or her work.

LLL IN UT STRATEGY 2010 - 2012

- Teaching is based on scientific research and the principle of lifelong learning
- Teaching and learning one of strategic research areas
- Lifelong learning underpinned by research and development
- ULLL as one form of dissemination of research results
- A form of the third mission
- Both a principle and special services
- Implementation plan of scientific teaching and lifelong learning
- UT as a learning organisation

The Strategy of the University of Turku: References to Lifelong learning

LLL priorities until 2015

The time span of the University Strategy reaches up till 2012, after which a new four-year strategy period will start. The implementation plans cover three years till 2012. Choosing any of the documented elements to be the three priorities of lifelong learning will do violence to the strategic process. For ALLUME purposes, we can name:

- Balancing the mainstreaming of commitment and specialization of expertise in the enhancement and organization of lifelong learning
- Documenting the entirety of lifelong learning for the use of the University steering process and the lifelong learners
- Embedding lifelong learning into the University mission as a relevant tool for disseminating the research results, as a covering principle in teaching and learning and a central element in the interaction with society.

4. Lifelong learning path

Main steps

The strategic promotion of lifelong learning in the University of Turku started in the context of adult education in the early 1980's. During the past fifteen years, *the key steps* have been:

1. University adult education strategy in 1996
2. The institutional evaluation of the University in 1999
3. The working group of adult education in 2002-2003
4. University lifelong learning strategy in 2006
5. Preparations for the University of excellence in adult education for 2006-2009
6. University strategy in 2009

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 university leadership saw a need for the internal rules of organisation, whereas CES was willing to sharpen the University profile in lifelong learning. For the leadership 'mainstreaming' was taking the ownership of the new mission at the margins of the university, for CES 'mainstreaming' was commitment to LLL as a basic task of the University.

The result of the first step was the first university-wide strategy for adult education in Finland. 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. However, being the first attempt to take a hold of the entirety, the result stayed at the level of description rather than innovative definition of future goals. Also, the analysis of the environment could have been more intensive.

The institutional evaluation of the University in 1999 was a part of the national development, where all the universities were evaluated. The decision of including adult education in the analysis was logical after the University and the national Evaluation Council (FINHEEC) agreed to examine the external impact of the University. For CES, the evaluation meant a new opportunity to sharpen the profile of LLL within the University. The University also made a conscious decision of using the evaluation as a means of developing its strategies. Consultations with the Peer Review Team and the independent evaluator added an international flavour for the evaluation of LLL.

During the institutional evaluation, the best description of the entirety of our LLL activities in the University thus far was produced. The external impact as the key viewpoint made us concretely look at the outcomes and effects of our work. Linking the evaluation and strategic work convinced us that evaluation is a practical learning environment. Tailoring the criteria embedded the work into our annual planning. However, being a one-time project, the evaluation did not directly enhance the construction of the quality assurance systems. We may also have put too much emphasis on the development of our strengths, whereas the weaknesses were not in the centre of the focus. Decentralising the preparations brought a heavy workload to many, but the whole personnel were still not involved.

The working group of adult education 2002-2003 was founded to implement the recommendations of the Peer Review Team of the institutional evaluation. The University made the decision of concentrating on the internal relations although CES saw a need to redesign the 1996 adult education strategy. The working group gave a wide report with a set of recommendations about the rules of the game within the University. The main propositions covered new fora for the strategic discussion of LLL, strengthening the role of the

faculties and institutes e.g. through contracts between the University units as well as clarifying the University's LLL service and specifying various student statuses.

The foundation of the working group was a logical next step in the strategic process. The group was able to design the University's answer to the recommendations by the PRT in such a manner that most of them could be handled by the follow-up evaluation in 2002. It also updated the statements of LLL in the University strategy. Analysing the position and options of adults at the University was a fruitful approach that supported the discussion between various parties. Nevertheless, concentrating the analysis on the internal structures and practices of the University took the emphasis away from important repositioning in a rapidly changing market. Only a part of the recommendations was implemented by 2005.

Designing a *lifelong learning strategy* became into the University agenda in the spring of 2005. After a new overall University strategy, the principles and practices of key activities needed revision. The fourth step of the strategic process had its foundations in the previous steps, especially the recommendations of the working group of adult education. The context of academic lifelong learning had become exceptionally challenging because of the structural problems of funding and fuzziness of the competition mechanisms.

The key issues of the strategic discussion in 2005 were the academic role of universities in LLL, the entirety of the LLL service of the University, the conditions of continuing professional development, regional development as a part of the third mission, university network as a resource base, funding mechanisms and rules of the game, quality assurance and skills management. The University Teaching Council produced a lifelong learning charter and agenda that included the main principles, objectives and implementation as well as some criteria for the valuation of the success. The value of the outcome became weaker, because the University Board was not willing to approve the Charter and the Agenda as independent definitions of policy, but the key content was built into the University medium-term action and financial plans.

Applying for *the national quality label of a University of excellence in adult education* for the period of 2006 – 2009 added a special element into the strategic work in 2005. The nomination of quality universities in adult education was a part of the resource allocation system of the Finnish universities till 2009. Sharpening the profile of university adult and continuing education was an important objective of the action. The universities worked up their applications for the nomination of quality universities in adult education following the guidelines by FINHEEC. The last process paid attention especially to the entirety of adult education in the universities, its networks and visibility, as well as the main achievements and success factors.

In the University of Turku, the application made also use of the long-term strategic process, especially the outcomes of the working group of adult education. The subgroup of adult education was the key forum for the elaboration of the application. Success in the quality competition demanded a good balance between the strategic aims and evidence of practical outcomes. The University of Turku was one of the four nominated universities. Again, the process was a very useful learning environment whereas the nomination was most important for the legitimating of adult education and lifelong learning in the University.

In its *evaluation feedback* for the University of Turku, the Finnish Higher Education Evaluation Council acknowledged the balanced and clearly documented development of pedagogic and content in adult education. FINHEEC regarded the determined strategic work for the linkage of adult education into the third mission of the University from the 1990's. The University was also mentioned to be active so as to

promote adult education through research and as a developer of blended learning. The University participated in various international projects so as to enhance the quality of lifelong learning.

In 2010, the Finnish universities have started a new phase as *independent public bodies* or foundations. The financial model of the universities is renewed. The new University law demands that universities promote lifelong learning. The two universities of Turku have merged and the new University has a new strategy, where lifelong learning is embedded in the definitions of policy, priorities and practices as well as the implementation plans. On the other hand, the universities cannot bypass the economic crisis, which has an effect also on lifelong learning. The current strategic choices are described in Chapter 3 and the future prospects and plans for implementation in Chapter 5.

Obstacles and challenges

While we have made some success in the strategic development and breakthroughs of implementation with many institutes and faculties, this is not the case with all the units and all the development plans. In the transformation into a lifelong learning university, specialised services for adults are developed, but *all features of lifelong learning are not present in the basic teaching and degree education all around university*. Generally, lifelong learning seems to make progress when the University's own decisions gain from external pressures.

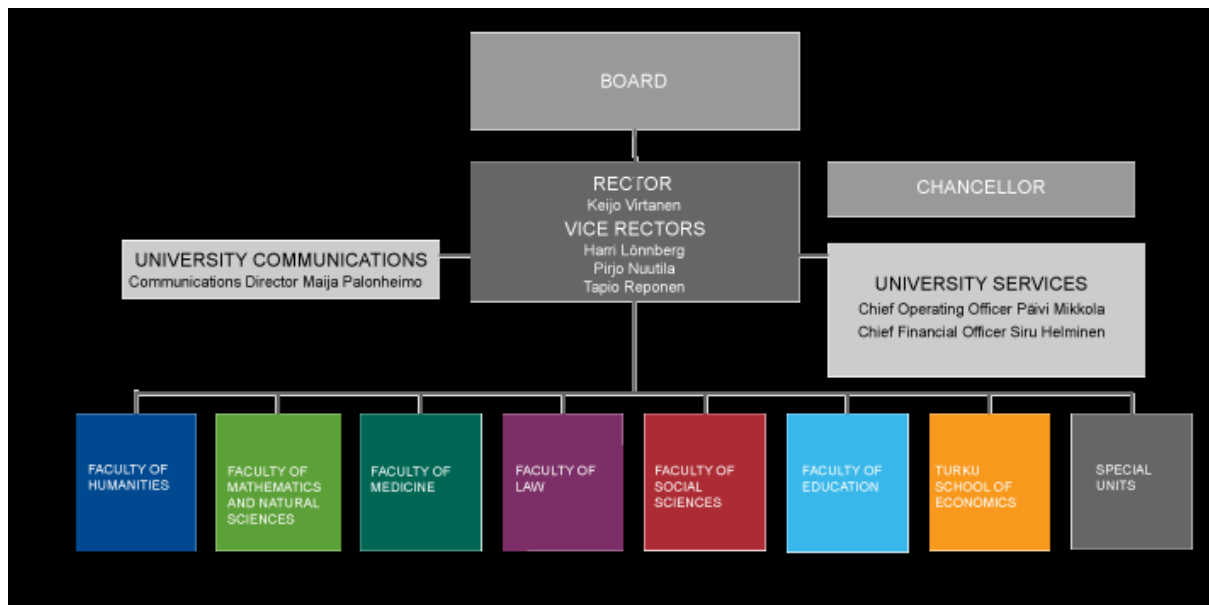
A successful lifelong learning university needs determined leadership, mainstreamed responsibility and specialized expertise. It has been a long way from adult education in the margins of the university into the mission statement with the lifelong learning impetus. To make lifelong learning a reality for the vast majority of faculty, we need both cultural progress and structural support in the management system. Without specialised experts, whose number one priority is lifelong learning, new audiences and demands will probably not find adequate support for their learning needs. One of the key questions is *how to balance the specialisation and mainstreaming of ULLL in the structures and processes*.

The fundamental challenge of promoting lifelong learning in the university is that the faculty has *many priorities*, of which scientific research is absolutely number one. Traditionally, education for Master and Doctorate degrees has been the second priority, while offering possibilities of learning for wider audiences has not been very high up in the agenda. In the University decision making, the presence of versatile internal interest groups makes the promotion of lifelong learning a challenge. The University Board decision not to approve a lifelong learning charter in 2005 was an example of the effect of additional factors.

As to the essence of academic lifelong learning *we need to find the solutions to utilize the outcomes of research for the benefit of lifelong learners*. This is not only a pedagogical question, but also a challenge for the organizational structures, financial arrangements and very importantly for staff development.

In the times of economic crisis, the universities need to find a financial balance in a new context. Once universities have to make cutbacks, they tend to protect the academic heartland and make sacrifices in activities that are relevant in their own right. Respectively, with reduced resources the *strategic investments tend to be allocated into the essential core*.

5. Organization



The organization chart of the University is also the basic structure for lifelong learning. *As a principle*, lifelong learning covers the whole University. *As to the lifelong learning services*, the picture needs some additions. The University has two special units for lifelong learning: the Centre for Extension Studies and the Centre for Maritime Studies. Most faculties offer some courses for adults, the Faculties of Medicine, Law and Education being the most active. TSE exe of Turku School of Economics offers executive education. Of the special units, also the Future Research Centre has activated in adult education.

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.

The task of the Centre for Extension Studies is to:

- 1) produce open university courses, academic specialization studies and continuing education and to carry out regional, national and international development projects in lifelong learning;
- 2) produce congress services and services for education and project activities primarily in university faculties and institutes
- 3) act as the lifelong learning unit of the University
- 4) carry out the coordination tasks of lifelong learning specified by the University Rector and;
- 5) act as one of organizers of staff development in the University in agreement with the University Services

The Centre for Extension Studies fulfils its task in cooperation with the University scientific community and the cooperation network.

6. Future

The future perspectives of LLL

The next three years will be *a momentum* in regard to the future path. The implementation of the University strategy has started in February 2010. The processing of the new strategy will start in the latter part of 2010 for the period 2013 – 2016.

The next steps

The University Strategy defines the main mission and principles within lifelong learning. These are described in Chapter 3. The strategy is made more concrete in *six implementation plans*. The most important plans for ALLUME interests are the plan for research based teaching and lifelong learning and the plan for the integration of the societal interaction with research and education. The other plans cover research, research sharp edges and research collegia, career paths, the merger of the two universities and internationalization. The implementation plans deepen the understanding of the relevant concepts and name the key priorities in the development of each plan. The organization of the implementation started in early 2010. After the short descriptions of the key implementation plans you can read the key issues that the Centre for Extension Studies included in its strategic plan for 2010 – 2012.

a) Implementation plan for research based teaching and lifelong learning

The key actor in the production of the most important work plan for lifelong learning was *the Teaching Council* of the University. The Council had been involved in the preparation of the content for the strategy from the beginning. The Council is organised into working groups, one of which is responsible for the area of adult education. The first initial discussion about the idea of including lifelong learning as a key element in the new University strategy took place in this working group in February of 2009.

The Teaching Council took a grip on the initiative by the working group already in the drafting phase of the strategy by focussing the development of academic teaching on the balance of strong foundation in research on the one hand and the principle of lifelong learning on the other. In the implementation plan, *lifelong learning is present in two ways*: it is one of the “baskets” of development and the viewpoint of lifelong learning will be taken into account in all the development activities.

The implementation plan is divided into *six “baskets of development”*:

- Research-based quality of teaching and learning
- Intensifying guidance and strengthening the ability to learn
- Lifelong learning as a guiding principle and a set of services
- Multifield approach and work life relevance of education
- Student recruitment

The essence of academic lifelong learning in the University of Turku covers strong links to research, multifield approach, student orientation, emphasis on learning outcomes, individual learning paths, lifewide learning and work life relevance. The University leadership, academic institutions and special units of adult education are responsible for making lifelong learning a reality. *The actions of the implementation plan* are:

- Strengthening the links to research and development. The University will make efforts to intensify the dissemination of research outcomes. Scientific research will support the development of the activities of lifelong learning. University sharpens its LLL profile internationally and RPL role nationally.
- The University will widen its lifelong learning services in cooperation with the clients and financiers. The open university will make use of new multifield courses and integration of courses for different audiences. In expert training and regional development, the continuous improvement of networks is fundamental. Key areas are teacher training and executive education in the public sector.
- The University will clear the structures and processes of lifelong learning. The services for the student will be organized into a functional entirety with the emphasis on the guidance services. A special service point for adult students will be launched. The quality system of lifelong learning will be widened to the whole university, regularised and published.
- The University will actively participate in the construction of the new national system of combinations of special competence.

b) Implementation plan for the integration of the societal interaction with research and education

The University of Turku has not got a parallel one to the Teaching Council in the interaction with the society. The preparations for the University strategy were made in a one-time working group. In the strategy, the University defines interaction with society an integrated part of research and education in the University mission. *The concrete manifestations* are: new knowledge by research and development, service research, the utilization of research outcomes, the working life relevance of degree studies at all levels, export of education, alumni cooperation, lifelong learning services and regional development projects.

In the external cooperation *the key baskets of the implementation plan* are sharpening the active role of the University in the regional development, making use of the know-how of the alumni and networks, the strengthening of the University's role in the innovation system and the firm-up of the service as a system. 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. The launch of incentives demands an appropriate set of indicators for the activities.

c) The strategic plan of the Centre for Extension Studies for 2010 – 2012

The Centre for Extension studies (CES) acts as the multifield lifelong learning unit of the University. *The roles of CES* are the production of lifelong learning services, the expertise in ULLL, services for the University institutions and faculties and ULLL cooperation inside and outside the University. The Centre has two main doors: one for the man in the street willing to take part in courses following the University curriculum and another for the experts and expert organizations willing to update and develop their know-how. The open university courses are open to everyone independent of age or motivation. The idea is to

offer possibilities for learning independent of place and time. In expert services CES offers CPD, organizes regional and development projects and offers services for the faculty willing to organize a conference or an international project. In addition to the lifelong learning profile, CES is active in the regional development in the Baltic Sea area.

CES is an independent unit in the University i.e. it is outside the faculty structure under the University Board. It cooperates with the faculties and institutes, experts in various fields and clients. *The essential feature of the networks is the linkage between the production and exploitation of knowledge.* The key foci of the networks are the cooperation between universities and other education institutions, links to regions, subregions and nationwide networks, connecting private, public and third sector actors and international activities.

In the action plan CES commits to the implementation of the university strategy and its work plans. As to lifelong learning, *CES aims at high quality both in academic terms and for the benefit for the student:*

- Links to research are intensified through the exploitation of research outcomes, the know-how of university researchers, curricula approved by the faculties and research oriented methods in teaching.
- Multi-field approach becomes real in the versatility of the prospectus, multi-field study units, multi-professional study groups and making use of various fields of science in the development work.
- Study orientation means taking into account the individual needs of various students and student groups in the curricula, delivery and guidance.
- The continuums of study guarantee the individual pathways and optimized recognition of prior learning.
- The practices of study planning emphasize the relevance of learning outcomes in teaching and guidance.
- Life wide learning is supported by a wide selection of services both in the working life and other areas of human activities.
- The contents and methods are planned to be relevant to the working life in order to enhance the exploitation of learning outcomes both in present tasks and for the future career

CES takes an active role in the implementation of the University strategy in cooperation with other actors. The different roles of CES in the implementation are collected into a table, where the production, coordination and partner roles in the various work plans are described. *Examples of CES activities are:*

- Forerunner in the utilization of blended learning
- The construction of focussed guidance point for adult students entering the university
- Key role in the national promotion of RPL in HEIs
- Key project coordinator in the national development of combinations of special competences for experts

- The front office for the cooperation with the actors in the subregions
- Participation in ALLUME and SIRUS projects to promote ULLL
- Commitment to produce general skills both for M.A. and doctoral students
- Commitment to promote the export of expertise with the regional and national networks
- Commitment to offer coordinator services for international projects.

In the annual plan and budget for 2010, CES has specified its activities, responsibilities and resources.

Medium-term conditions and trends

Academic lifelong learning is structurally dependent on the trends of the University, the Ministry of Education and the markets. In the *education policy* the significance of adult population and lifelong learning increases. The obligation of the Universities Act to promote lifelong learning lays the foundation for permanent progress. The European Union, the parties of the process of Bologna and the networks of universities have set lifelong learning internationally at a central position in their reforms. Ultimately, the permanence of the public finance determines how the political will becomes concrete in the legislative work and budget solutions.

The fundamental changes in the *universities* also affect the production of lifelong learning services. The principle of lifelong learning is an essential part of the new strategy of the University of Turku. The merger of the Turku University and Turku School of Economics opens opportunities for the production of new services. At the same time the need for the control of the entirety of education increases. The change in the legal status requires new expertise in the management of finances, which is still more systematic and controls the risks properly. The structural changes in the university affect the motivations, practices and roles of lifelong learning.

The changes in the age and educational structure of the population increase the demand for academic adult education in the *training market*. On the other hand, the new learning forms, environments and the service providers tighten the competition. The rise from the recession will be insecure and multifaceted, especially in the public administration the demand for services will strengthen slowly. The possibilities to find programme financing will be good in the plan season, but after this programme period the need for direct market funding will increase.

7. Funding systems

Sources of funding

The funding system of academic lifelong learning is most multidimensional completeness. When we look at the principle of lifelong learning *in the whole university*, lifelong learning has not been a focus of financial statistics or follow-up. Certain appropriations can be regarded as LLL investments or expenditure, but there is no condensed information about the total amount or distribution. The universities receive their general

funding according to a calculatory model. The Ministry of Education reshaped the model in pursuance with the reform of the juridical status of universities into independent public bodies. The Universities have to find a growing share of their funding from external sources. In the University of Turku for example, the proportion of soft funding has been 31 % and the objective is to raise it up to 40 % during the present planning period.

The mission of the *open university* is to offer university courses to all interested with reasonable costs. The open university gets about two thirds of its funding from the University budget and one third from the student fees. The appropriations were earmarked till the end of 2009, but in 2010 they became a part of the calculated model and the University Board and Rector can make the decisions of the allocation of resources. At the same time, the new Act determined an upper limit for the course fees. The maximum fee is based on credits and led to the lowering of the fees. The Parliament directed a relevant amount of funding to compensate the loss, but the funding mechanism was too loose to assure the funding for the intended purpose.

Continuing professional education is to be self-financial. Up till 2009 the universities had a chance to subsidize the prices with their own funding after the permission from the Ministry of Education, but this possibility was rarely used and it was abolished in 2010. The Ministry of Education allocated small amounts of funding to the universities for the product development of extensive CPE programs till 2009. This budget lot was transferred to the new apprenticeship-type of training that is available for both the universities and the polytechnics. All the changes have led to a most market-driven steering model. While the financial standings in different sectors of society are different, the possibilities for lifelong learning have become quite differentiated as well. As a consequence, the University units offering lifelong learning services have inconsistent financial preconditions. Especially the Faculty of Law and the Business School are able to make profit, whereas many other units struggle to find funding to improve the expertise of their alumni.

Traditional courses have lost ground in the development of human resources compared with the multifaceted *regional, national and international development projects*. One of the explanations is the functional exploitation of the triangle of teaching, research and development/innovation. Another is the possibility to use international project funding in cases, where the objectives are in line with the program criteria. In the university budget, the project funding is a separate budget segment that has the biggest growth figures in recent years.

The multifield University takes advantage of various *funding bodies*. Each unit has its special relations to the relevant financiers. It is not easy to draw a general picture of the financial composition, but the University is in the process of renewing its economy and business strategy in 2010. The “broker organisations” of the University like CES as a general lifelong learning unit and TSE exe in executive education have wide experience and strong expertise in the control of the funding networks.

The total budget

	Total expenditure 2009 (M€)	Budget 2010 (M€)
University of Turku	210,5	260,4
LLL services in UTU (rough estimation)	12	13
Centre for Extension Studies	6,5	7,5

No figures on the total expenditure of lifelong learning in the University are available.

Allocation in relation to sources of funding in main tasks (estimation)

In CES	State	Other public	Fees	Contracts	Program funding	Foundations	Total
Open University	65 %		35 %				100 %
Continuing professional education	10 %		40 %	50 %			100 %
Regional development projects	5 %	25 %			70 %		100 %

State allocations

In the open university funding, the earmark was abolished in 2010 and the state allocation is a part of the universities' calculated model.

In CPE, some state funding is available for continuous teacher training. The funding is allocated through competitive bidding.

In the regional development projects, some programmes include state allocations as a part of self-financing.

Allocation procedures

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

The University Board approves *the budget*. University Rector makes the decision of the concrete allocation.

The University and the faculties and institutes sign *a financial contract* annually. The Faculties have boards, but the deans have been assigned wide competence.

The Director of the Centre for Extension Studies is authorized to make all the decisions in the unit. The previous board was transformed into an advisory board from the beginning of 2010. The annual budget is structured in line with the CES sections, teams and projects. The budget is a combination of allocations and contract funding that we know in advance, decisions on where we want to invest and estimations of future income in the wide selection of courses and projects.

The external funding from financiers, contracts and fees is a part of the books of each University unit. Till 2009 an overhead of 15 % of the income was directed to central administration. In 2010, a working group is appointed to compile a plan of the drivers to cover the indirect costs.

Investment in new initiatives

At the *University level*, in addition to the traditional allocation of resources, the leadership has a new tool, while 2,5 million € of the total budget of 263 million € are allocated to strategic targets.

In the *Centre for Extension Studies*, the new initiatives are traditionally funded through external funding. Within the limits of the financial situation of the unit and the terms of the appropriations, programs and projects, the director of CES is competent to allocate funding to relevant needs. There is also 30 000 € in the total budget of 7,5 million € especially reserved for new initiatives.

Full cost model

The full cost model is used in limited areas of research funding, but the model is not in use in the projects of lifelong learning. The University is planning to widen the use of the model in 2010.

Strengths and weaknesses in funding

The Centre for Extension Studies has been able to cope with the economic fluctuations by making use of the *mixture of public and private funding*. During the times of boom, the demand has been large enough to open scopes for the actions. In recession, public funding has been available to moderate the effects of unemployment. The challenge is to extend the strivings to receive market funding so as to strengthen the financial independence of the institution.

The *project-based operations and financial model is flexible* in various situations, while it lays a challenge for the staff policy, especially with fixed-term contracts. Basically, in project funding the institution is quite able to adjust the costs according to the income. Exploiting the potential of project funding demands, however, careful cost awareness and active responsibility of fund-raising. The dependency on project funding also means the dependency on external decision-making.

Working in the market context has driven CES to a *different financial logic* than the typical faculties and institutions. The traditional “state budget approach” in the faculties has been the allocation of resources to institutions, vacancies and activities. The core question has been how to make ends meet and the typical solution in financial problems has been to find possibilities for cutbacks. In CES the “market-driven” analysis and design of incomes has been much more significant in the preparation of the budgets. With financial problems, searching for more funding is as typical as tightening the belt.

Trends and future perspectives for ULLL funding

After the fundamental university reform, the core question is *whether the universities will find adequate funding in general*. The academic and political agenda emphasise the high quality research role of the universities and the position of lifelong learning in the universities is still fairly vague. If the institutions have to struggle substantially to cover their costs, the academic heartland will be the first priority and finding resources for lifelong learning within the universities will become even more demanding.

In the universities lies another transformation, the effects of which are still insecure. *The demand to raise the proportion of external funding* compels the university faculties and institutions to find more possibilities of selling their products and services. This may lead to useful interaction with working life and society in general, also in lifelong learning. However, there is also an actual risk of seeing the third mission as a fund-raising mechanism that may not serve the needs of external stakeholders and lifelong learners.

In the university reform, the ministry of Education distributed most funding to the university decision making. Previously lifelong learning was able to use national project funding that is now available only in very limited amounts. Two obvious risks are present: Firstly, most national reforms and innovations need a wide common understanding between universities and a complicated system of contracts. We have already experienced great practical problems in the organization of a nationwide web portal for the open university students. Secondly, the national project funding was used widely in the development of lifelong learning. In the new situation, this financial tool is no more available. Financing the national lifelong learning network has already suffered from the effects of these two amendments. *While the universities have to struggle for their own funding, we can expect to see problems even in the activities, where national cooperation would be advantageous.*

The new financial status of universities outside the state budget structure will offer flexibility in the financial planning. On the other hand, it demands even *better financial expertise* both in the central administration and in the faculties and lifelong learning units. The LLL expert organizations benefit from their earlier experience in the market context and can serve the faculties by their expertise.

In the markets, it is obvious that the competition will tighten, not only between universities, but with many public and private education and training organizations. The market situation in education will reflect the globalization in working life. The trade of expertise and training will grow in line with the value of

knowledge as a factor of production. Even the in-house training in international organizations has become multicultural and international. The potential advancement of informal and non-formal learning environments both in the work organizations and in the social media will bring another challenge for the productivity of university expertise. Finally, the educational organizations will have to struggle for the time of individuals with a variety of services.

8. Staff

ULLL-staff situation

The 1996 adult education policy confirmed the fundamental structure of lifelong learning: the University has separate *centres of expertise for adult education and networks of excellence* in the faculties and institutes. In the new strategy for the years 2010 – 2012 the same structure is the basis for the idea of lifelong learning as a guiding principle in all education but also specialized services for wide audiences.

As to the principle, we can regard *the whole University staff responsible* for the promotion and implementation of lifelong learning. Also, the strategy conceives the University as a learning organization following the LLL principle offering possibilities for staff development and future careers. In addition to this, the University has *special units* that have certain sectors of adult education or lifelong learning as number one priority in their mission. Finally, the Centre for Extension studies is named the lifelong learning unit in the University.

Most of the staff in specialized lifelong learning activities work are dependent on external funding. There are, however, exceptions, and e.g. special training in medicine and dentistry receive their funding from the university and university hospital budget. Risks of funding have a reflection in the employment. Traditionally, a large proportion of staff worked with *fixed-term contracts*. Recently, permanent appointments have become more usual, but in practice the continuity of work necessitates the continuity of services and funding.

The amount of personnel in LLL

As with the statistics of finances, *lifelong learning has not been a focus of documentation of human resources*. We were able to collect exact information from the specific lifelong learning units and central administration, but we needed to estimate the figures in other institutions and faculties. The rough total estimation will bring us to one hundred employees, who have lifelong learning as their main occupation. The Centre for Extension Studies is the biggest unit with some 75 employees.

Functions and positions

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 organization 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. The planner typically pairs with the course or project secretary responsible for the clerical work. The project coordinators and secretaries build up teams or groups that are collected into the sections for open university and expert services. The group or team leaders are in charge of their parts, the heads of sections for the larger entities. The Director of the Centre is competent and responsible for the decision making in the whole unit. Support staff takes care of data administration and general administration of the Centre.

Researchers and teachers work typically only part-time for lifelong learning. There are only few teachers who have a special responsibility for open university. In central administration new half-time posts are recently set up for lifelong learning and interaction with society. The role of the new coordinators is to promote the implementation of the University strategy in the specific areas.

Internals/externals

The idea of *research underpinning learning* is the underlying assumption in the whole university teaching. Academic lifelong learning has the same ideal. In practice, there are many obstacles and hindrances in the way. Some have to do with the organization of research, e.g. its specialization and the divide into the teacher and researcher roles. Some have their background in the balance between the offer and demand of expertise: what the region needs may not be present in the university. Some are problems of resources, for example when the professor prioritizes research and does not find enough time for other activities – research oriented practices may also be too expensive for the clients. In spite of the challenges, the strong research base is a key element in the essence of lifelong learning and a significant success factor.

Still, the knowledge production does not take place only in the scientific communities but also in the various sectors of working life. The Turku University adult education policy in 1998 made a determined commitment to use *external expertise in the planning, organization and delivery of courses*. In CPE programs for example, it is typical to collect a planning group to design the learning environment. In the successful courses, you will find a functional balance between the academic and professional contributions. The external teachers may come from public research or expert organizations, consultation firms or various organization of working life. In the advanced programs, the participants themselves constitute considerable concentrations of expertise.

Course delivery

In open university, the curriculum is the same as in the degree education. The traditional organization still makes use of University teachers while the Open university in CES offers the managerial and guidance support. The wide use of blended learning has created a more complex mode of organization with tutors, IT specialists etc.

In CPE, CES works as the production unit collecting the relevant expertise to deliver the courses. The teachers and tutors are invited from various scientific and professional communities with the idea of connecting the useful and relevant combinations of expertise.

9. Target groups & Services

Target groups of ULLL

The University has a multi-field offer making use of the faculty disciplines and adapting to the market.

CES Open University offers education from all six faculties and the Business School. During the past ten years, we have annually organized studies in approximately thirty subjects, ten of which in advanced studies. Additionally, the supply includes language and communication courses. The University invites the students independent of their age, sex, education or motivation. The open university works in cooperation with other educational organizations to promote learning opportunities for the elderly.

In *CPE, the Centre for Extension Studies* enhances the expertise especially in the fields of education and social and health care. Psychotherapy courses are available both for therapists and their educators. The unemployed and immigrants will find permanent services. The entrepreneurs and other economic life actors are key target groups of regional development projects.

The Centre for Maritime Studies is the second biggest organization in its field in Europe. It produces CPD for shipping, harbour activities, transportation, logistics and regional development.

The Faculty of Medicine organizes Turku Postgraduate School of Health Sciences for the personnel in the health sector.

The Department of Dentistry organizes courses both for the open market and by contracts. In addition to the basic target groups, the Department organizes qualification courses for immigrated dentists.

The key interests of the *Department of Teacher Education* are the teachers in various education institutions. The Department also produces development programs for work communities.

The Faculty of Law is the most active academic organizer of CPE in its field. Intensive courses are open for all jurists. The Faculty also cooperates with the Ministry of Justice and The Finnish Prosecution Service.

The Centre for Learning Research carries out training for various groups of teachers, school psychologist and curators. The main objective is to update knowledge in teaching and learning and to develop working skills. Most courses are delivered as in-house training.

The Track of Translation and Interpreting in the School of Languages and Translation Studies offers specialization courses for conference interpreters in cooperation with the interpretation units of the European Commission and Parliament.

The University Communications organizes a "*Children's University*" with lectures for 7–10 years old and science camps for children between 10 and 12 years.

Most interesting target groups

The University of Turku is inspired to serve the *wide audiences of citizens* because of its special history. When Finland gained its independence in 1917, there was only one university, in Helsinki (transferred from Turku in 1828), which functioned mainly in Swedish. The Finnish intelligentsia therefore wished to set up a university, which would operate through the medium of Finnish. A nationwide fund-raising campaign was organized, to which altogether 22 040 donors contributed, mainly very ordinary people - artisans, farmers, shopkeepers and teachers. University of Turku was founded in 1920.

Each faculty, institute or special unit has its own special emphasis. 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.

Support services

The University has a substantial offer of services both for the degree and adult students. The focus of development is the *accessibility, usability and coordination* of the services. Some essential services and actors are condensed below.

In the University, *guidance* is organized in each faculty and department. The focus of development is to make it work as a whole. The Open University Section in the Centre for Extension Studies is a key actor in the guidance for adults. A service point for adult students is included in the University strategy by the initiative of CES.

The alumni network is a route to the expertise and services of the University. The faculties have their own alumni organisation while the University Communications is in charge of the university-wide network. Alumni cooperation also supports the lifelong learning purposes. One of the useful services is the mentoring system, where the members of the alumni contribute to the transition to work after degree studies.

The Career Services reminds the students that it is never too early to think about the future career. The Service is concerned with internships, information on placement in the labour market, career guidance etc. It serves the University, the students and the employers.

The Centre for Extension Studies is essentially a support system both for the adult students and the University units. The students find guidance and information both face-to-face and virtually. The units benefit from the Congress Office and the services for the projects.

The data administration serves both degree and adult students. The utilization of new technologies is often experimented in the learning environments of lifelong learning, but access to the services is not unproblematic. Remarkable reforms are "under construction".

Turku University Library is an open-to-all scientific library, which primarily serves research, teaching and studying within the University. The nationally significant collections of the library consist of printed publications from the end of the 15th century until today, and also of extensive electronic resources.

The Study Psychologists are specialists in the psychology of learning and the guidance of students. They help with difficulties in the understanding of texts and lessons, learning skills, writing the theses, learning motivation and time control.

The University organises special support for *students with disabilities*. The University has a spokesman for the disabled and a plan of support.

Wide services for *international students* are available. They are organised by the central International Office in the University Services and by International Officers at the Faculties.

10. SWOT-Analysis

The SWOT-analysis was processed with the structure of the *EUA Lifelong Learning Charter*. The CES management team processed the analysis. The plan is to discuss the analysis in the lifelong learning subgroup of the Teaching Council after the subgroup has started its work in September 2010.

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

	In	Out
+	The University recently launched a strategy with strong commitment to lifelong learning.	Implementing the strategy effectively
-	Strategy commitments do not support budget decisions sufficiently.	Risks arising of the general problems of funding in the universities

2. Providing education and learning to a diversified student population

	In	Out
+	The University has a wide selection of services for various audiences.	The political climate supports lifelong learning.
-	The entirety of the services is complicated.	The challenges for the universities to transform into a supporter of informal and nonformal learning

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

	In	Out
+	Open university is open for the man in the street in practice.	The reform of the selection of students into the degree studies
-	The open university channel into the degree studies does not function properly.	The reform of the selection of students into the degree studies

4. Providing appropriate guidance and counselling services

	In	Out
+	The University has organized versatile services for guidance and counselling.	The wide national and regional cooperation to develop guidance
-	The entirety of the services is complicated and does not function properly.	The project orientation of development and cutback of resources after the projects

5. Recognising prior learning

	In	Out
+	UTU is the most active university in the national promotion of RPL.	Strong support in national politics
-	Mainstreaming RPL in UTU is a challenge.	The potentially growing "traditionalism" in universities

6. Embracing lifelong learning in quality culture

	In	Out
+	The UTU quality system covering lifelong learning is accredited.	Utilization of UTU research capacities for the development of LLL quality
-	The utilization of the quality system is not too effective.	External quality pressures and bureaucratization of quality work

7. Strengthening the relationship between research, teaching and innovation in a perspective of lifelong learning

	In	Out
+	CES and UTU regional development is accustomed to the knowledge triangle approach in practice	Wider concentrations of expertise exploiting the triangle approach
-	Strategic funding may be directed too narrowly to research.	Lack of funding after the current program period

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

	In	Out
+	CES and other units have participated actively in various development projects.	Social media as a forum of development and a place for new learning environments
-	Exploitation of project outcomes has not been mainstreamed to the full.	Rigidity of universities to transform their activities and services into the new environments

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

	In	Out
+	UTU and CES have a strong tradition of practical networking.	Connecting the versatile knowledge production and client-oriented service offer
-	The tailoring of projects to the specific client needs has become too expensive.	The capacity to act profitably in the market after the program period

10. Acting as role models of lifelong learning institutions

	In	Out
+	LLL staff is motivated to learn and active in participation.	Learning organization supporting the staff recruitment
-	The skills management system of UTU or CES is not well developed.	Short-term ambitions

11. Conclusion

When we collect the SWOT- results that are based on the EUA Lifelong Learning Charter, we can read a conclusion of the analysis.

STRENGTHS	OPTIONS
<ol style="list-style-type: none"> 1. The University recently launched a strategy with strong commitment to lifelong learning. 2. The University has a wide selection of services for various audiences. 3. Open university is open for the man in the street in practice. 4. The University has organized versatile services for guidance and counselling. 5. UTU is the most active university in the national promotion of RPL. 6. The UTU quality system covering lifelong learning is accredited. 7. CES and UTU regional development is accustomed to the knowledge triangle approach in practice. 8. CES and other units have participated actively in various development projects. 9. UTU and CES have a strong tradition of 	<ol style="list-style-type: none"> 1. Implementing the strategy effectively 2. The political climate supports lifelong learning. 3. The reform of the selection of students into the degree studies 4. The wide national and regional cooperation to develop guidance 5. Strong support in national politics 6. Utilization of UTU research capacities for the development of LLL quality 7. Wider concentrations of expertise exploiting the triangle approach 8. Social media as a forum of development and a place for new learning environments 9. Connecting the versatile knowledge production and client-oriented service offer 10. Learning organization supporting the

<p>practical networking.</p> <p>10. LLL staff is motivated to learn and active in participation.</p>	<p>staff recruitment</p>
<p>WEAKNESSES</p> <ol style="list-style-type: none"> 1. Strategy commitments do not support budget decisions sufficiently. 2. The entirety of the services is complicated. 3. The open university channel into the degree studies does not function properly. 4. The entirety of the guidance is complicated and does not function properly. 5. Mainstreaming RPL in UTU is a challenge. 6. The utilization of the quality system is not too effective. 7. Strategic funding may be directed too narrowly to research. 8. Exploitation of project outcomes has not been mainstreamed to the full. 9. The tailoring of projects to the specific client needs has become too expensive. 10. The skills management system of UTU or CES is not well developed. 	<p>THREATS</p> <ol style="list-style-type: none"> 1. Risks arising of the general problems of funding in the universities 2. The challenges for the universities to transform into a supporter of informal and nonformal learning 3. The reform of the selection of students into the degree studies 4. The project orientation of development and cutback of resources after the projects 5. The potentially growing “traditionalism” in universities 6. External quality pressures and bureaucratization of quality work 7. Lack of funding after the current program period 8. Rigidity of universities to transform their activities and services into the new environments 9. The capacity to act profitably in the market after the program period 10. Short-term ambitions

Strengths. The University of Turku has documented experience and expertise in various forms of lifelong learning. The recent strategy is a step towards more significant LLL in the mainstream University.

Weaknesses. The mainstreaming of LLL has taken place only partially and the system of lifelong learning is complicated.

Threats. The general challenges of the universities may lead to the protectionism of the academic heartland. The rigidities of universities produce a hindrance to concrete renewal.

Options. The external stakeholders regard the University as a valuable actor in the lifelong learning agenda. Feasible development paths have been defined in the implementation plans.

The steps forward from the strategy are defined in the implementation plans. See Chapter 5.

“Do’s and Dont’s of promoting ULLL”

Do’s	Dont’s
Prepare for a long journey	Don’t think that you are already there
Do your homework	Don’t take anything for granted
Know the University and the Context	Don’t think that you’ll hear applause at once
Provide yourself with the support of the University leadership	Don’t think that you can do it alone
Ally yourself with the externals as well	Don’t only play the university game