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Analysis of Nordic educational projects designed to meet challenges in society

Defining the success factors

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ANALYSIS OF NORDIC EDUCATIONAL PROJECTS DESIGNED TO MEET CHALLENGES IN SOCIETY

Defining the Success Factors

Final report, May 2012

NVL Competence project 2009-2012

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Summary

This is a study of educational projects deemed to be successful by a consortium of experts in each of the Nordic countries. Twenty one examples of educational projects and programmes were analysed based on information delivered by the institutions responsible for the projects. The focus of the study was the question: "What made these projects successful?" The result is a list of eight "success factors".

It is quite common that individuals, groups and even whole societies turn to learning and education to cope with crisis and other challenges. Governments and other agencies who distribute tax money often encourage learning providers, trade unions and other agencies supporting human development to create learning interventions to address specific crisis, challenges or changes.

In view of recent crises experienced by the Nordic countries The Education and Training Service Centre in Iceland (www.frae.is) proposed a research project in 2009 to study "how education can help societies to meet challenges, make use of opportunities and create changes". The project received funding from NVL (Nordic Network for Adult Learning, www.nordvux.net).

The aim of the project was to create a handbook with recommendations on how to prepare and carry out educational projects designed to help individuals, groups or society to meet challenges. The project's method developed somewhat as it evolved: National expert consortiums chose examples of recent successful educational projects. Project descriptions, submitted on special forms created by the researchers, were analysed using qualitative methodology. The cases studied were seen as exemplary, but not representative, examples of good practise. Success factors emerging from the data were classified, structured and interpreted. This happened in three stages. A draft report was submitted to a midterm conference where participants in the example projects and other experts were invited to discuss and comment on the preliminary findings. These comments were incorporated into this final report.

The results are eight "Success Factors", which are elements of design, process or structure identified in the successful projects:

1. **Networking:** Planning, implementation and development of the programme is based on networking of various - and even unexpected - organisations and players/participants.
2. **Process evaluation:** Continuous project development, documentation and analysis of results are integrated in the project using Process Evaluation or Action Research.
3. **Flexibility:** The programme offers flexible access and participation, individualised content or individualised study methods (ICT).
4. **Focus on needs:** The programme focuses on authentic regional, sectorial or individual needs and problems, which are recognised and systematically analysed providing tailor-made solutions.
5. **New role for institutions:** The project includes innovative new roles for organisations which have traditionally been working in different fields of education.
6. **Getting new groups involved:** The programme motivates new groups of participants, who have usually been non-participants, or are a new target group for the training organisation. Aiming at new groups fosters innovation in the training organisation.
7. **Community as pedagogical strategy:** The pedagogical design of learning interventions aims at creating a sense of community between participants.
8. **Sustainable new structures and practices:** The project has challenged organisations and participants to develop new structures and practices which continue to exist and further develop after the project has ended.

These results are summarised in a list of recommendations on page 44 with the hope that they can help practitioners to design and implement successful educational projects in the future.

Contents

1 Introduction

1.1 The idea behind the project

The first decade of the twenty-first century brought some major changes that affected the economy and the labour market in almost all Nordic countries. Especially severe structural changes took place in Iceland. There was a downswing in fishing and fish-processing in sparsely populated areas, the US military base closed down and, last but not least, the global financial crisis hit the country exceptionally hard in October 2008. One of the consequences was a steep rise in unemployment. At the same time, figures from Iceland Bureau of Statistics and OECD ([Education at a glance 2011](#)) indicated that about one-third of the labour force had not completed upper secondary school. In the debate on education among the social partners in Iceland, raising the educational level in the country was emphasised as a means to strengthen its economy.

Knowing that the other Nordic countries, especially Finland and Sweden, had faced similar challenges, the Education and Training Service Centre owned by the social partners in Iceland wanted to use the opportunity provided by NVL to study how education can help societies to meet challenges, make use of opportunities and create changes. The idea was to gather examples of effective educational projects and programmes from all Nordic countries and analyse them in order to establish what made them successful. The analysis should shed light on what characteristics these successful projects and programmes had in common. The final outcome would be a practical handbook with guidelines for educators based on the findings.

As the competence project progressed, it became clear that the researchers' analysis and report could be seen as an independent report. Half-way through the project, a seminar was arranged in Lund, Sweden. The working group wanted to hear the voices of those who had contributed information on their projects. A draft of the researchers' report was sent out beforehand to all registered participants with the message: "We would appreciate your input on what characterises education and training that succeeds in strengthening individuals, organisations and society in the perspective of managing change and crisis."

The seminar was organised as an arena to discuss and give input to this draft report. The seminar included participants from all Nordic countries and provided the researchers with comments, opinions and additions. People involved in the projects/programmes being studied confirmed that the analysis was in line with their intentions. Thus, the final result of the analysing process is a report which summarises successful ways of organising and offering education and training which can enhance the possibilities for people and organisations to cope with rapid change and crisis. The report also contains a list of characteristics and criteria that seem to be common to all or many of these effective Nordic learning projects. This report forms the research base for the handbook: "Åtta framgångsfaktorer, från nordiska utbildningsprojekt som möter utmaningar i samhället" (in English: "Eight Success Factors, from Nordic Learning Projects that meet Societal Challenges"). The working group decided to publish the researchers' report together with a booklet in 2012 and present on national seminars held in the Nordic countries.

1.2 How were the examples of educational projects and programmes selected?

The Competence Project (http://www.nordvux.net/page/8/kompetensutveckling.htm) was established in 2009 by appointing five national reference groups headed by NVL coordinators in all the Nordic countries. The role of each reference group was to choose examples of successful and educational projects and programmes, to nominate a representative to a Nordic workgroup and to arrange a national seminar to present the examples of projects and programmes gathered in the respective country.

A *programme* is defined here as a large scale national initiative setting the objectives and providing funding for more operational regional and local projects (like Noste-programme in Finland). *Projects* are smaller, usually initiated by the actors who have also applied for the funding for the project. A programme can include several projects.

In February 2010, a Nordic steering group was established in Reykjavik. The steering group consisted of the following representatives: Anne Karppinen, FI, Birgitte Johnsen, NO, Ingibjörg E. Guðmundsdóttir, IS, Ingegerd Green, SE, Peter Müller, DK, and Sigrún Kristín Magnúsdóttir, the NVL coordinator. The group defined the project in detail and set a work plan for the project.

Introduction

Examples of successful projects and programmes were selected using different procedures in each participating country:

- **Denmark:** The national reference group, with members from various organisations and companies from different areas in Denmark, chose to hold a competition of educational projects and programmes. The purpose of the competition was to make innovative ideas, practise and experience from companies, educational institutions and the third sector more visible and to inspire and share knowledge on how adult learning and social competences can be developed in cooperation between education, work and cultural sectors. A total of 20 examples were submitted. Prizes were awarded to projects in three categories in early December 2010.

- **Finland:** The Finnish group has representatives from different areas of Finland and from various organisations and milieus. The group selected eight examples of educational projects and programmes to be a part of the Nordic Competence project. There has not been a national seminar in Finland.

- **Iceland:** The national reference group gathered 20 examples of educational projects and programmes. Then two experts were employed to rate and rank them and suggest which criteria should be used to describe them. The experts choose eight projects and programmes out of the 20 nominated. The results were presented to the national reference group and the group acknowledged the results. A national seminar to introduce the eight examples was held in Reykjavik in May 2010.

- **Norway:** The former Norwegian NVL coordinator established a national reference group and held a national seminar in November 2009 where some examples of projects and programmes were presented. In 2010 a new group was formed and met once following the appointment of a new NVL coordinator. The Norwegian group decided to focus on finding examples of education within the social and health-care sectors. In the end these examples did not fit the premises of the project.

- **Sweden:** A group of five people from different backgrounds and institutions was formed in 2010. The group started by defining the criteria to be used for selection of examples of educational projects and programmes. These criteria included project continuation after the end of funding, innovation, and cost-effectiveness. The group chose five examples which fulfilled the criteria.

The Nordic group met in April 2010 in Copenhagen with a group of researchers: Anne Liveng, DK; Hróbjartur Árnason, IS; Ingegerd Green, SE and Jyri Manninen, FI. The researcher group was invited to join the project after its inception. Selection of projects had begun in Sweden, Finland and in Iceland, so there was a group of projects (27 projects) with various descriptions and additional materials available from the beginning.

The researchers were briefed about the examples of educational projects and programmes gathered and on the progress of the project so far. In the months that followed, further information on the examples was compiled and categorised. The examples were and described using a case description form in English specially designed by the researcher group. Then the researcher group started their analyses on good practices and the search for commonly agreed criteria.

In sum, each national group used its own criteria to choose successful programmes or projects. These were subsequently analysed by a group of researchers.

1.3   How the projects were analysed and the success factors defined

The first decisions in the analysis process were to agree on the basic idea for the research. Because of limited resources and the potentially huge amount of data ("Nordic adult education provision"), it was agreed that:

1) only a selected sample of adult education programmes and projects will be analysed, and this sample is treated more as an example, not as a representative random sample

2) the aim is not to define "best practices" but "success factors"

3) the analysis will be qualitative, based on the factors "emerging" from the data.
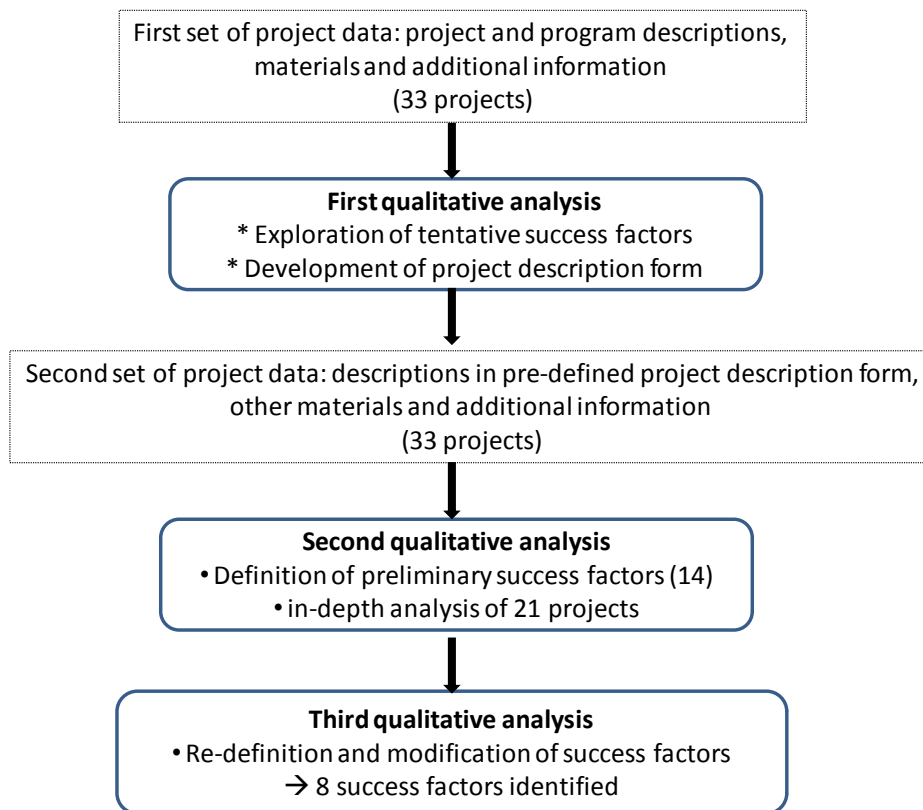
Introduction

The researchers decided to find relevant, interesting and special elements which make these projects successful by reading the project descriptions "with open eyes". The first common factors which emerged from the data and seemed to indicate what had contributed to the project's success were: networking with different stake-holders, creating new roles for organisations and a needs-based approach in the planning of the projects. These factors were labelled "success factors", because it seemed evident that they had contributed to the project's success and they were common to most of the projects.

Later on, projects from Denmark and Norway were included for analysis, and some additional projects from the other countries were also selected. For the second round of data collection a more detailed and structured project description form (Appendix 1) was developed. Directors of the most promising and interesting projects and programmes were asked to give additional information using this form, in order to get more uniform information for the analysis.

Finally, an in-depth content analysis was conducted on 21 selected projects. Initially the researchers found three common success factors, and during this second round of analysis the aim was to (1) analyse how these success factors were evidenced in the 21 projects, and (2) find what other success factors the data would reveal. Each researcher worked individually on the analysis of his/her assigned projects. The outcome of this analysis was a table with 14 success factors and a detailed description of how they appear in the 21 projects.

The third and final qualitative analysis took place face-to-face in a two day meeting. All project descriptions and success factor definitions were discussed in detail, and by the end of the analysis, the number of success factors was reduced from 14 to 8. Some factors were combined (such as cooperation and networking), some changed, redefined or deleted. For example, during the analysis process it became evident that a success factor called "sustainability" described an outcome rather than a factor contributing to a project's success. Therefore this success factor was redefined and given the name "sustainable new structures and strategies", and was applied to projects which had implemented structures and strategies which would ensure sustainable outcomes of the project.

In the end, 8 success factors were identified, based on a detailed analysis of 21 Nordic adult education projects and programmes. These are described in more detail in the following chapters. The figure below summarises the analysis process:

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┌─────────────────────────────────────────────────────┐
│ First set of project data: project and program       │
│ descriptions, materials and additional information    │
│                  (33 projects)                        │
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                        │
                        ▼
┌─────────────────────────────────────────────────────┐
│              First qualitative analysis               │
│        * Exploration of tentative success factors     │
│        * Development of project description form      │
└─────────────────────────────────────────────────────┘
                        │
                        ▼
┌─────────────────────────────────────────────────────┐
│ Second set of project data: descriptions in pre-      │
│ defined project description form, other materials     │
│ and additional information                            │
│                  (33 projects)                        │
└─────────────────────────────────────────────────────┘
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                        ▼
┌─────────────────────────────────────────────────────┐
│             Second qualitative analysis               │
│     • Definition of preliminary success factors (14)  │
│         • in-depth analysis of 21 projects            │
└─────────────────────────────────────────────────────┘
                        │
                        ▼
┌─────────────────────────────────────────────────────┐
│              Third qualitative analysis               │
│   • Re-definition and modification of success factors │
│           → 8 success factors identified              │
└─────────────────────────────────────────────────────┘
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Model 1. The analysis process

Introduction

The eight success factors defined in this study are described in table 1. A more detailed analysis, descriptions and examples from data are available in the next chapters.

Table 1. Success factors

Networking	*Planning, implementation and development of the programme is based on networking of various - and even unexpected - organisations and players/participants.*
Flexibility	*Programme offers flexible access and participation, individualised content or individualised study methods (ICT)*
Focus on needs	*Programme has a focus on authentic regional, sectorial or individual needs and problems, which are recognised and systematically analysed providing tailor-made solutions.*
New role for institutions	*Programme includes innovative new roles for training organisations which have traditionally been working in different fields of education.*
Getting new target groups involved	*Programme motivates new groups of participants, who have usually been non-participants, or are a new target group for the training organisation.*
Process Evaluation	*Documentation and analysis of results is integrated into the project, Process evaluation & Action Research*
Community as a pedagogical strategy	*The pedagogical design of learning interventions aims at creating a sense of community between participants.*
New structures and practices which are sustainable and innovative	*The project has challenged organisations and players/participants to develop new structures and practices which continue to develop after the project has ended.*

1.4 Our approach and its relation to Project Management research

For at least the past 50 years there has been a vibrant discussion going on amongst those who research project management on what constitutes and influences project success and failure. Most research on project success seems to be focused on the project *management* itself (cf. Literature reviews in: Cooke-Davies, 2002; Gupta, 2007; Shokri-Ghasabeh & Kavousi-Chabok, 2009; Tishler, Dvir, Shenhar, & Lipovetsky, 1996). In this discussion some make the criticism that projects are often judged on issues such as whether they finish on time and on budget rather than whether they lead to stakeholder satisfaction, which from our point of view is to judge them on whether or not a project met the needs it was designed to meet.

The reader of this report will soon realize that none of these elements have been analysed in this study. There are no descriptions on whether the projects were managed in a novel way, finished on time, met the objectives or spent the money wisely. In addition, there are only a few descriptions of pedagogical (or "andragogical") innovations, which have often been the main focus in valorisation projects (for example Manninen, Nevgi, Matikainen, Luukannel & Porevuo, 2000).

On the contrary, the aim of this analysis was to find a "fresh" and qualitative perspective on project evaluation. Instead of looking at the process (management, timelines, contents etc.), the analysis was focused more on the contextual elements which seem to make adult education programmes and projects more successful. Some of the findings are – hopefully – novel and interesting. For example, success factors, networking and new institutional roles are rather unique elements, not usually mentioned in project management handbooks.

There are some old elements of established adult educational practices as well, like flexibility and needs, but it seems that these are not fully considered in practice, and are therefore worth repeating every now and then. In a recent review of project management "bodies of knowledge" Terry Cooke-Davies (2002) revealed "anticipated

Introduction

benefits" as the "touchstone" for the success of a project. This finding is definitely in line with our findings if we define benefits as the fulfilment of needs. A project is, therefore, considered successful if it delivers the anticipated benefits and thus meets the needs it was created to fulfil. Furthermore, Cooke-Davies (2002) found that a critical factor to project management was a process which ensures clear communication between beneficiaries and project management. In our cases this could mean both a good common understanding among all stakeholders of the needs to be met and open communication about these issues between all levels of the project. In our analysis we refer to this through the term Networking.

Although research on project management and critical success factors tends to focus on factors immanent in the organisations and the teams carrying out the project, which differs from our focus, various researchers have found other success factors, such as when a project aims at definite, clear benefits and values – or fulfilment of needs – for the beneficiaries of the projects.

Finally, it is worth mentioning that the aim of our analysis is not to define "best practices", but "success factors". Even though EU-projects generally nowadays aim at identification and subsequent dissemination of best practices, this approach has many problems. First of all, analysis of best practices requires a large data pool, a clear definition of what is considered as "best" and also, what is considered as "practice". There is also the problem that "best practices" are not completed things, items or tools, which can be moved from one context to another, rather they are contextual and evolving processes with an unlimited timeframe (Arnkil, 2010; Conklin, 2006). Therefore, in this study the term "success factor" is used. These are defined as elements, structures or practices which seem to be common to all or many of the projects which are considered successful in the field of Nordic adult education.

2 General description of the projects

This chapter gives a general overview and basic analysis of the projects and programmes which were selected for the study. The projects will be introduced in order of size and scope. At the end of the report in the discussion part the projects will be analysed and compared using a "mapping tool". This mapping exercise gives a general understanding of the aims, philosophy and role which the selected projects and programmes seem to have in Nordic societies.

2.1 Introduction of the projects and programmes

This introductory part aims at giving a general overview of the projects and programmes selected for analysis. In order to ease the task of reading and understanding, the rather substantial mass of different kinds of projects and educational programmes is introduced in order of size and scope, using the following grouping:

1) Large-scale national programmes

2) Regional development programmes

3) Network initiatives

4) Branch initiatives

5) Local innovative practices

This grouping is merely used to introduce the projects. These groups may be partly overlapping (for example, a regional development programme could be a network initiative as well), but the aim is to differentiate between the projects so that a general picture becomes visible and specific details of project continuum become easier to recognise.

2.1.1 Large- scale national programmes

These programmes are large-scale initiatives, usually on a national scale and continuing for a number of years. These are more accurately defined as *programmes* rather than *projects*, the difference being that they are state-financed framework programmes which usually provide funding for local individual projects and activities where the actual implementation of the programme takes place. For example, the Finnish Noste-programme spurred regional tailor-made projects where local adult education institutes worked together with regional employers in order to motivate lower-educated workers to get formal recognition for their skills.

The programmes belonging to this category are described below.

LARGE-SCALE NATIONAL PROGRAMMES		
Project Data	**What were the main objectives of the programme?**	**How was the programme organised and performed?**
Noste *Country*: Finland *Organisation*: Ministry of Education http://www.minedu.fi/OPM/Julkaisut/2010/Noste-ohjelma_2003_2009._Loppuraportti.html?lang=&extra_locale=en	To give lower-educated but experienced workers a chance to get formal recognition of their skills, and to motivate them to learn and study for formal qualifications.	A large-scale programme* organised in co-operation with the state, employer organisations and trade unions. Implemented in 2003-2009 as a national programme* throughout the country. Development of innovative methods for motivating and recruiting passive adults into education.

Education and Training Service Centre *Country*: Iceland *Organisation*: Education and Training Service Centre www.frae.is	To raise the level of education among the Icelandic workforce by establishing an institution with experts on various aspects of adult learning, to create courses and support processes such as recognition of prior learning, guidance and counselling in the workplace.	Establishing the Education and Training Service Centre as an institution owned by the social partners and financed by the state was part of an agreement between the social partners, the Icelandic Confederation of Labour (ASÍ), the Confederation of Icelandic Employers (SA) and the Ministry of Education. The preparations for the ETSC started in the summer of 2003 with the hiring of a managing director. Currently there are 12 employees working in 11 full-time equivalent units.
Guidance and counselling in the workplace (on the labour market) *Country*: Iceland *Organisation*: Education and Training Service Centre www.frae.is	To reach out to people with little formal education and encourage them to continue their competence development or finish studies they started but did not conclude. To analyse the need for education in the target group in order to get ideas for suitable courses.	The project was facilitated by an agreement between the social partners and the Ministry of Education on financing guidance and counselling at the Life-Long Learning Centres around the country. ETSC contracted the Life-Long Learning Centres and the Vocational Centres in Iceland to carry out the work. Counsellors offered guidance and support by visiting people at their workplaces instead of inviting/obligating them to come to an institution they are unacquainted with. Lifelong learning centres were encouraged to hire educational and career counsellors to visit people at work to offer them guidance and guide them towards useful courses and programmes such as recognition of prior learning.

Common to these programmes was that they were often planned in cooperation with different stakeholders and were designed to meet a common nationwide (or even European or global) need. For example, the low educational level of the aging workforce is a challenge for the whole European Union, and programmes like Noste in Finland and ETSC in Iceland were simply national responses to this need. A similar program, "Kunskaplyftet", was organised in Sweden some years ago.

This kind of programme usually needs political consensus and institutional consistency to succeed. In these cases raising the educational level and giving formal recognition to prior learning was a common interest for the state (a higher educational level of the work force), labour unions and workers (better labour market position, strengthening of job security and leverage for salary negotiations), as well as employers (getting better-qualified workers and an easier recruitment process with formal proof of skills).

2.1.2 Regional development programmes

These projects are smaller in scope than the above-mentioned. They focus on specific regional needs and operate in a specific geographical region. Characteristically, these projects are based on strong cooperation between different players/participants within the region (for example, local training organisations and employers). There is usually a common regional problem which motivates different stakeholders to act together. A good example is New Waves, where the low educational level of a region was the starting point for a development programme.

General description of the projects

Regional Development Programmes		
Project Data	What were the main objectives of the project?	How was the project organised and performed?
New Waves *Country*: Finland *Organisation*: ESEDU www.esedu.fi	To develop flexible vocational training in close cooperation with local and regional employers.	Based on cooperation between regional vocational education centres and business life which helps to develop tailor-made training to meet local needs.
Suðurnes First reaction *Country*: Iceland *Organisation*: Suðurnes Life Long Learning Centre www.mss.is	To help 1000+ inhabitants of Suðurnes, Iceland to adapt to lay-offs after a NATO base was closed.	A taskforce with stakeholders created a programme incorporating counselling, study guidance, validation of prior learning and various capacity building courses in order to help people enhance their competences and self-efficacy and find or create new jobs.
New Path *Country*: Iceland *Organisation*: Life-Long Learning Centre of Eastern Iceland, (ÞNA). www.tna.is	To prevent mass unemployment due to a cut in the fish quota in East Iceland by strengthening and developing the existing supporting structures in the municipalities. Enabling actions to broaden job availabilities motivate individuals to create their own jobs, increase entrepreneurialism and motivate existing businesses and institutions to create new jobs.	Through cooperation with local stakeholders and Learning and Innovation Centres inhabitants at risk were visited at their workplace, offered study counselling and guidance and consequently invited to validate their prior learning and take courses relevant to their needs.
A Stronger Community *Country*: Iceland *Organisation*: Farskólinn – Life-Long Learning Centre in North-western Iceland www.farskolinn.is	To enable people to find new job opportunities and hence continue living in their home community, by increasing and widening their competencies as well as strengthening their self-esteem. To find methods and study environments adapted to the needs of adult learners, regardless of age, gender or residence.	A two year educational programme with evening courses, totalling 384 lessons, was provided by the regional Life-Long Learning Centre. The centre contracts educators from different local schools. The courses count towards 24 credits in an upper-secondary school. About 60 inhabitants, average age 45, were involved from the start.

2.1.3 Network initiatives

These projects are large network initiatives where the different players/participants and stakeholders cooperate for the common good. They differ from the above- mentioned regional projects in that they do not focus on a single geographical region.

A good example is Kunstgreb (Denmark), where the Artists' Union cooperates with a private consulting company and creates a consortium with various companies. Vincent in Sweden is based on a network between Gothenburg Folk High-School, Företagarna (Entrepreneur organisation), Business Region Gothenburg, an IT University, ESF, and five folk high-schools which serve as regional schools throughout Sweden.

General description of the projects

Network initiatives		
Project Data	**What were the main objectives of the project?**	**How was the project organised and carried out?**
Toive *Country:* Finland *Organisation*: Luovi Vocational College	To help handicapped people access the labour market after vocational education by developing concrete models and materials for employers and employees to use when employing handicapped persons. Subsequently this will meet the growing need for the labour force in the labour market.	Three vocational training organisations working with disadvantaged groups developed both a methodology and handbooks through collaboration with employees in companies, college faculties and students.
Kunstgreb *Country*: Denmark *Organisation*: Danish Artists' Association	To provide companies with first-hand experiences of creative processes by developing forms of collaboration between artists and companies and thus developing the companies' own creative skills and methods to use these processes. To expand job opportunities for artists.	The project started as collaboration between The Danish Artists' Union (DAF) and the consultant company Wischmann Innovation. New creative processes, methods and skills were developed through a training program for both artists and the companies involved. The programme consisted of three parallel modules of training over a period of 32 weeks. The project also included a research study documenting the effects of the collaboration between artists and the business sector.
Kollegial Vejledning *Country*: Denmark *Organisation*: Region Sjælland	To develop patient education for hospital staff, enabling patients to take responsibility for their own health through increased awareness of their illness. This was seen as a new method of prevention and treatment of psychiatric illness.	The project was developed in cooperation between Roskilde University, The Danish School of Education and The Regional Psychiatric Hospital in Zealand. The project applies alternative methods such as theatre, pictures, dialogues and written and oral exercises. A key factor is that education takes place in organised meetings between care givers and patients.

Characteristically these projects are based on strong cooperation and networking. Training organisations working together in the Toive (Hope) project had similar target groups with similar employability problems, and therefore it made sense to cooperate and benefit from additional strengths possessed by each organisation.

2.1.4 Branch initiatives

In the next group the projects focus on a specific branch of business or sector of society. There is a common need within a sector which motivates stakeholders to act together. For example, in CNC Teknik[2010] several large companies realised that they have a common need to validate the skills of their employees, and therefore they started a successful cooperation for creating validation processes. Finnish entrepreneurs had a project focusing on training of entrepreneurial skills.

Branch initiatives		
Project Data	**What were the main objectives of the project?**	**How was the project organised and performed?**
Finnish Entrepreneurs' Apprenticeship Project *Country*: Finland *Organisation*: The Federation of Finnish Entrepreneurs	To strengthen the competitiveness in SMEs hit by the economic crisis in 2009, by developing the skills and competencies of both the entrepreneur and the employees in SMEs.	The Ministry of Education granted 300 extra places for short-term vocational education and training for entrepreneurs and employees in SMEs by apprenticeship. The training was in a field of expertise that the entrepreneur him- or herself considered important**.** The selected training courses were very "hands on´", thus easy for practical entrepreneurs to relate to.

General description of the projects

CNC Teknik[2010] *Country*: Sweden *Organisation*: Skärteknikcentrum Sverige www.skarteknikcentrum.se	To provide the metal-cutting industry with skilled workers through validation of prior knowledge, development and certification of competence. To develop and implement a system for validation and certification of knowledge and skills of different types of workers, e.g. CNC operators of different levels.	The project was initiated by the Metalworkers Union IF Metall in cooperation with several other organisations on a national level. The system with all its different components was developed in structured workshops with teams of experts and work groups consisting of leaders, skilled workers, teachers and researchers during a 5 year process. Approximately 200 reference companies, experts, consultants and pilot projects were involved.
Design in Metal *Country*: Iceland *Organisation*: IDAN Vocational and Training Centre, Printing and Graphic Area www.idan.is	To find new job opportunities for designers, product designers and graphic designers after the economic crash of 2008, and at the same time strengthen the competitiveness of the Icelandic Iron Work Industry by new insights into the importance of design.	During the first part of the project courses were given on metal production processes and three-dimensional designing. After that designers started designing and developing artefacts and products provided by the ironworks.
Value of Work *Country*: Iceland *Organisation*: Education and Training Service Centre www.frae.is	To develop methods to validate the real competencies of experienced bank employees with a low level of formal qualifications; to document and certify their competencies in cooperation with employers and other stakeholders.	A Leonardo da Vinci granted project with several national and international partners. Expert groups developed competence standards which were tried out in a pilot with 19 bank employees. The results have been further developed together with the Confederation of Icelandic Bank and Finance Employees, ETSC and several banks.
Vincent *Country*: Sweden *Organisation*: The Gothenburg folk high school www.vincenteducation.se	To create a flexible, blended learning programme for SMEs in order to strengthen their competitiveness. To create a network of folk high-schools that would be responsible for the programme.	The project was developed in cooperation between The Gothenburg folk high-school Företagarna (FR), Business region Gothenburg (GBR), IT university and Almi. The project budget reached ca. 10 million SEK. Contents, structure and infrastructure of the educational programme* were developed in close collaboration with companies. Pilot programmes* were carried out and the system established with the folk high-school network of providers. Moreover, a blended learning structure is now up and running.
krAft *Country*: Sweden *Organisation*: Jönköping International Business School www.kraftprov.nu	To strengthen the competitiveness of SME by developing the SMEs capacity for strategic business development. To develop a concept of building sustainable and efficient learning networks based on mutual exchange between smaller companies and universities.	The project was led by a consortium of four universities and funded by the National Knowledge Foundation with a budget of app. 60 million SEK. The development of the krAft-method and concept involved a great number of SMEs, individuals, researchers and practitioners / professionals for a period of approx. 4 years.

2.1.5 Local innovative practices

These are small-scale projects which focus on local needs or take place locally. These are quite often reactions to structural changes affecting a local economy. Perlos in Finland and the Suðurnes, First reaction NATO case in Iceland are good examples of projects which were organised to support individuals and/or local economies in the wake of a close-down of a major local employer. Perlos was a factory employing over 1000 people, and the NATO air base was the biggest employer in the small village of Suðurnes. Stakeholders were called together in order to respond to the new situation and help people living in this area who had just lost their jobs. Many of them had worked for the same employer for many years and had acquired many skills despite very little formal education.

These projects can also be ideas or innovative pilots projects, generated in some cases by individuals or individual organisations.

Local innovative practices		
Project Data	**What were the main objectives of the project?**	**How was the project organised and performed?**
Perlos *Country*: Finland *Organisation*: City of Joensuu	To support employees made redundant in a factory shutdown situation with multiple activities and projects.	A task force, the Perlos Group, was set up by representatives from the Employment and Economic Development Office, Perlos workers and employers, municipalities, North Karelia entrepreneurs, the City of Joensuu , the North Karelia Chamber of Commerce and the Adult Education Centre of North Karelia. The Perlos Group designed and executed special activities, such as re-training, support and career counselling to help people to adjust to job loss.
FLOW *Country*: Denmark *Organisation*: Adult Education Centre Odense and FORA 1748	To provide an educational degree programme (HF) aimed at young people with no formal education and little or no contact with the labour market, but with a strong interest in music and/or the performing arts.	The content and form of the education programme was designed and executed by VUC Odense (Adult Education Centre Odense) and FORA 1748 (a "folk high-school evening" in Odense) by combining the two organisations' specialities and expertise. The project developed an educational form that combines traditional subjects with music and performance activities in a way that motivates the student to finish their studies.
Prisma *Country:* Iceland *Organisation*: The Iceland Academy of the Arts and Bifröst University	To develop a course at university level that would give unemployed people (who have passed matriculation examinations or the equivalent) new perspectives in their job search. To combine rational thinking with creative thinking in a university education.	The content and pedagogical framework of the course was created by the Iceland Academy of Arts and Bifröst University in cooperation with the Reykjavik Academic Society. To solve the financial questions involved in enabling unemployed people to attend a university level course, the project cooperated with various unions and trade unions, the Directorate of Labour and the Ministry of Education. The 8 week intensive course gave participants the opportunity to learn theories and methods from various university disciplines as well as acquiring useful tools stemming from the different disciplines which contribute to the course.

3   Success Factors

In this study twenty one projects and programmes were chosen by national groups in each of the Nordic countries. Each country used its own selection criteria, so there is no common rule by which the projects were deemed successful. These projects were consequently analysed based on factors "emerging" from the data, with the aim of finding what we call here "Success Factors" – elements of structure, design or practise – which seem to have contributed to the project's success.

The eight Success Factors defined in this study are described in detail in the following chapters. Each Success factor is introduced in the same manner, with a definition, examples from the data, an explanation why the factor is considered important for project success, and finally a short link to relevant theoretical background.

3.1   Networking

Planning, implementation and development of the programme is based on networking of various - and even unexpected - organisations and players/participants.

One of the most common innovative characteristics of the projects studied was the fact that they were planned and implemented in cooperation with several organisations, training organisations and social or governmental players/participants. This kind of networking not only made the project ideas novel, but was often the necessary ingredient for successful implementation.

3.1.1   Examples from our data

In large scale national programmes it was customary that various social partners were involved in the project. For example, programmes focusing on labour markets and vocational skills development (such as Noste and ETSC) were usually based on cooperation between trade unions, employer organisations and the state. Together with training organisations, they created networks which made the actual implementation possible. In the Finnish Noste programme the network was described in this way:

> *The programme was based on strong cooperation at political/national as well as local level, including vocational adult education centres, vocational institutes, adult education centres, folk high-schools, general upper-secondary schools, labour market partners, the Federation of Finnish Enterprises, and the Ministry of Labour. (Noste)*

In a similar way the networking of the state, employers and employees made the ETSC programme possible:

> *ETSC is owned by both partners on the work market: Trade unions and employer organisations. It is supported financially by the state. This triangle seems to be one of the most important success factors for this project - the fact that employers and employees can sit together and plan, support and execute projects aimed at increasing the capacity of their target group. The joined forces have been able to acquire reasonable funding for large projects which have benefited many people. ETSC's expansive and supportive network with regional players is another important success factor. (ETSC)*

Networking was an equally important success factor for smaller-scale programmes as well. In many cases the innovative element was to create an unexpected or non-traditional network, which helped to develop new innovative programmes as well. For example in Kunstgreb, an artist's union, a consultant company and several private companies created a network which made a rather exceptional idea of placing artists into companies possible:

> *Developed by the Danish Artists' Union together with the consultant company Wischmann Innovation, and including approx. 60 companies, among others Post Denmark, Nokia, The Danish State Railways (DSB) and Coloplast, supervised by Copenhagen Business School (CBS). (Kunstgreb)*

Most Icelandic projects were based on close networking between the local authorities, adult education institutions and other players/participants. The same applies to Danish cases; for example in FLOW a vocational adult

education centre and a liberal adult education centre networked and created a new model of combining vocational and liberal education in an innovative way:

> *Organised by VUC Odense (Adult Education Centre Odense) and FORA 1748 (A "folk high-school evening" in Odense) in cooperation. (FLOW)*

3.1.2   Why is this Success Factor important?

Networks enable the partners to generate better and more ideas. They also provide easier access to funding, trainers and educational organisations, places of study, policy makers and new target groups.

The analyses revealed that networking generated new ideas and/or helped to put them into practice. This success factor is also connected to another one because it motivates the generation of "new roles" for organisations. For example in Flow, a new combination of liberal and vocational studies has proved a successful innovation, which is based on networking.

Networking also enabled and secured funding, either by having funding partners (state, regional administration or companies) as members of the network, or by making funding applications by networks more attractive and successful.

It was obvious that especially new "non-traditional" networks between different kinds of training organisations or players/participants provided many benefits. This kind of organisational cooperation helped to generate even more innovative ideas, break the traditional roles of the organisations and especially motivate new target groups to participate in learning activities. For example, FLOW managed to motivate passive young adults into vocational education by providing easy access and attractive learning opportunities, initially in liberal studies.

Networking also helped to motivate the members of the participating organisations to participate in the programmes. For example, in Kunstgreb the idea of getting artists and companies to cooperate wouldn't have been possible without a joint project. In Noste and ECTS trade unions were crucial for motivating low-skilled workers to study, and employer organisations were instrumental in convincing their members to provide support and study leaves for their employees.

Networking helped to maintain commitment to the programmes, and also to provide easier access to different places, like apprenticeship placements in the Finnish Entrepreneurs' Apprenticeship project or artists in Kunstgreb.

3.1.3   Connection to relevant theories and research

Networks can be social (between people) or institutional (between organisations). In this analysis the networks were mainly institutional, based on cooperation between different actors in the educational field. Institutional networks can be defined in the following way:

> "Institutional networks in the field of education are usually a type of interaction in inter-organisational networks, i.e. are understood to be a specific cooperation by several organisations designed to cover a longer period of time for the attainment of jointly stipulated objectives and added value for the individual participants" (Bienzle, Gelabert, Jütte, Kolyva, Meyer & Tilkin 2007, 8).

Network Concept (Castells, 2000; Barabasi, 2002) is based on a view of a new way for the economy and society to work. Networks are perceived as forums for the development and sharing of expertise. Participation in social networks is based on social building and construction of knowledge and skills in a community. Networks can also be seen as 'communities of practice' which are skills- and expertise-building communities, often small groups of specialists who work on a formal and an informal basis (Lave & Wenger 1991). Such communities frequently share intellectual or skills-based goals that motivate them to work together in a networking context (Korhonen, 2005).

Social networks are structures which enable cooperation between individuals and/or institutions. Networks exist over a longer period of time and are created in order to attain joint objectives and to generate added value for its members. Networks are not (necessarily) based on official agreements and there is no hierarchical status between the members. Networks are long term structures, voluntary, and based on trust and recognition of common interests. Networks are also based on exchange (of "goods", ideas, services etc.), and some theories see

networks as an extension of one's own resources, because they provide access to the resources of the other partners. Social networks are closely related to social capital, because trust is the key element holding the networks together.

Networks may also be regarded as 'knowledge environments', which focus on the importance of knowledge construction and development processes. The networks may be used to compare different ideas, explanations and argumentations about the subject of the information and examine them critically and at the same time from a number of different points of view (Manninen, Burman, Koivunen, Kuittinen, Luukannel, Passi, & Särkkä, 2007, 72).

Networks enable 'co-configuration' which has its basis in cultural-historical activity theory and the model of expansive learning developed by Engeström (1987). The present-day organisational forms emphasise the importance of cooperation and networks to achieve higher-standard products. A 'learning network' may be perceived as a modus operandi in an organisation that is based on purposeful and organised learning. (Korhonen, 2005.)

3.1.4   Recommendations

A project is likely to be more successful if it is based on network initiative, planned and implemented by someone who share the same interests, or have mutual benefits . Networking between different stakeholders is usually a better guarantee for funding, more active participation, better contents and outcomes.

3.2   Process evaluation

Continuous project development, documentation and analysis of results is integrated in the project using Process Evaluation or Action Research

Although only a few projects included this good practice in their design and implementation, it is designated as a success factor, because it certainly helped these projects to become more successful. The innovative element here is that instead of traditional summative evaluation (where evaluation of effectiveness and outcomes of the project takes place at the end of the programme) evaluation is included in the project implementation from the very beginning, and follows it throughout the planning and implementation process. This can be done by using existing systematic models like Process Evaluation (CIPP-model, Stuffelbeam 1985, or Developmental Evaluation, Manninen & Kauppi 2008), Action research methods, or simply by having the evaluator(s) involved in the process during the whole programme.

Process evaluation is not the same as a "normal" reflective approach in expert jobs. Evaluation has to be systematic, planned and a well-resourced activity.

3.2.1   Examples from our data

Process evaluation and research-based follow-up of the outcomes was used in a systematic way in only one large-scale national programme (Noste) and in two smaller projects. In the Finnish Noste programme evaluation was described in this way:

> *Closely associated with the implementation of the Noste programme was research which provided stimuli and ideas for further development of the programme implementation. Qualitative evaluation and monitoring of the programme were conducted with the help of commissioned studies at the University of Tampere and the University of Joensuu. Research activities carried out almost throughout the programme period were focused on outreach activities, educational and study guidance, support measures, learning at work, regional networks of education providers and the impact of education. The research reports have been included in the final report of the Noste Programme 2003-2009 (Reports of the Ministry of Education and Culture, Finland 2010:8, http://www.minedu.fi/OPM/Julkaisut/2010/Noste-ohjelma_2003_2009._Loppuraportti.html)*

ETSC was basically a project similar to Noste, but process evaluation was not used as systematically. However, ETSC also had some elements of continuous development:

> *The work of the ETSC is regularly documented and evaluated internally and some activities are also externally evaluated. (ETSC)*

In two small-scale projects research was included in the project implementation. These projects (Kunstgreb and Kollegial vejledning) had university partners as members of the network, and therefore there was a "natural" interest in research and systematic evaluation:

> *Research of the process is an integrated part of the project undertaken by the Danish Artists' Union and Copenhagen Business School, which is going to submit the final results and documentation of the project. Apart from educating artists into art innovators Kunstgreb is working on explicit research and documentation of the relationship between companies and artists in order to collect data and record the value of the results attained.*

In a similar way the university partner in Kollegial Vejledning provided researchers who were involved as process consultants and documented and evaluated the project. Some evaluation elements were included in Kraft and CNC Teknik2000, which was revised every three years.

3.2.2 Why is this Success Factor important?

Traditionally evaluation is missing from projects, or is used only at the end of the training programme to check on outcomes. The alternative approach to evaluation is based on the principle that evaluation already starts at the beginning of the planning process. This kind of process evaluation helps to analyse the needs and the context, define objectives, plan and modify the implementation phase and training-learning processes, and finally to evaluate the outcomes and benefits. The idea is not to use evaluation at the end to check the quality of the programme, but to guarantee from the beginning that the programme is implemented in the best possible manner.

Evaluation is therefore used as a tool, not as a judgement (compare Hämäläinen & Kauppi 2000). It enables continuous development of the programme, by analysing what works and what needs to be developed further. A good evaluation plan also helps so-called valorisation, where best practices are recognised and made visible. It also supports the documentation and dissemination of good practices and enables good analysis of project outcomes.

3.2.3 Connection to relevant theories and research

The combination of evaluation and programme-planning and implementation can be done in many ways. There are several evaluation models which break the traditional "after the process" mold. Most obvious is the CIPP-model (Context, Input, Process, Product; Stufflebeam, 1985), which is perhaps the best known process evaluation model. Another is the so-called "Rolling Feedback" model (Brown & Evans, 1990), where evaluation results are instantly given back to the project players/participants so that they can modify the running program respectively. In Finland a model called Developmental Evaluation (Kauppi, 1992; Manninen & Kauppi, 2008) is nowadays used in all large scale programmes financed by the Ministry of Education and Culture, since it has proved useful in several projects (Manninen & Luukannel, 2008; Manninen, 2008; Atjonen, Mäkinen, Manninen & Vanhalakka-Ruoho, 2010).

On the research side there are methods like Developmental Work Research (Engeström, 1987; 2005) and Action Research, which has generated many different approaches since Kurt Lewin (1946) introduced the general idea. Both methods have the same basic idea of using research as an intervention and a development tool. Engeström's model is based on Activity Theory and the assumption that development follows the dialectical pattern, whereas Action Research is a more "practice and solution oriented" approach.

The difference between developmental or process-oriented evaluation and action or developmental research approaches is slight. "Evaluation" and "research" are generally defined as different kind of activities (Popham, 1988), and the same difference lies between process- and intervention-oriented evaluation and research. Research aims more at theoretical results, whereas evaluation has more practical objectives and focuses on the programme at hand.

Developmental evaluation has adopted many principles from qualitative methodologies (Guba & Lincoln, 1989). It usually applies both qualitative and quantitative methods and is more open to "social construction of reality" and multiple perspectives than more traditional evaluation models which emphasise strict measurements of pre-defined objectives.

In developmental evaluation more qualitative methods are needed because the programmes and projects under development are often quite complex and involve different players/participants and stakeholders. It also makes sense to "get the big picture" during the process, instead of focusing on more measurable details. It is also common for practitioners and funding organisations to want to have a broader understanding of the outcomes of the programme. Therefore it is common for developmental evaluation to be more or less based on principles such as illuminative (Parlett & Hamilton, 1976), participatory (King, 1998; Cousins & Whitmore, 1998; Garaway, 1995) and stakeholder evaluation (Ayers, 1987).

Developmental evaluation is a rather complex process in itself, often making use of the following principles:

- evaluation is considered a learning process for the community of actors

- actors and participants actively participate in the evaluation process

- cultural diversity and pluralism is accepted

- evaluation and doing are closely integrated

- evaluation is contextual

3.2.4 Recommendations

Process evaluation should be included in all larger scale projects and programmes. It has to be systematic, professional and well-resourced in terms of funding and work days. If it is not possible to use a nominated researcher (especially in small scale projects with limited resources), the same principles should be applied in order to conduct a smaller but still systematic, planned and participatory process evaluation with necessary documentation.

3.3 Flexibility

Programme offers flexible access and participation, individualised content or individualsed study methods (ICT)

This success factor is related to the old (but often forgotten) principles of adult education: education should be based on individual learning needs and be organised so that adults can make space in their complex life situations for studying. In practice this means that the contents are personalised to some degree, timetables are flexible and study methods enable learning in more individualised and flexible ways. Flexibility is nowadays usually related to the use of information and communication technology (ICT) in order to facilitate access and individualised study opportunities.

3.3.1 Examples from our data

A rather common way to provide flexibility was to make use of different kinds of learning environments, usually work-based (contextual) learning environments. In "New waves" this was done by using so-called practice firms. A practice firm or enterprise is a teaching method where the learning environment simulates the operations of a real-life enterprise, and the purpose is to learn about the enterprise's activities and the conditions for its success. The students together with teachers and experts from the field design the operational environment of the practice enterprise (Manninen, Burman, Koivunen, Kuittinen, Luukannel, Passi, & Särkkä, 2007, 106).

> *The goal of the college is to shift from traditional classroom teaching to new learning environments that are closer to real working life. Entrepreneurship is learned through new models, e.g. practice firms (New waves).*

An authentic work environment was also used in the "Finnish Entrepreneurs' Apprenticeship Project" where the pedagogical organisation was based on short, practical courses, with apprenticeship periods in real business environments. Easy access and individualised learning processes were also available.

In the project "Guidance and Counselling in the Workplace" flexibility was created by one-on-one counselling at the client's workplace during work hours. This enabled very flexible access as well as individualised content.

Flexible study methods were used in the Vincent project in order to adapt studying to the busy schedules of the entrepreneurs:

> *Built on the idea of flexible learning. Considers the demand to be present at the company during office hours and still be able to keep up with competence development. One year programme with 12 meetings one evening a month and in-between distance learning on the web. (Vincent)*

A good example of various forms of flexibility was Noste, which included low-entry threshold (free of charge, learning during working hours and flexible timetables, tailor-made outreach activities) and individualised content:

> *The Noste Programme was free of charge for students, employers and entrepreneurs. It was based on flexibility including individualised programmes and timetables, also enabling studying during work hours. New outreach methods were used to motivate lower-educated workers. (Noste)*

"Kunstgreb" was also based on the "learning at work" model. Education in art innovation is based on active work as an artist and training in companies, not on formal education. The contents of the study programme are also built on common interest and negotiations between the artist and the company. Learning and work placements were also supported by the use of online discussion forums where the participants were able to reflect on their experiences.

3.3.2   Why is this Success Factor important?

There are various reasons why flexibility is important. First of all, adults' learning needs vary considerably and tailor-made, individualised study contents are usually the best guarantee for successful training. Tailor-made content, or content which is adapted to the learner's needs, is also a very important motivational factor in adult learning. By helping the learners to adapt the learning content to their needs, teachers and organisers can boost the learner's interest and thus the benefit of the learning experience too. Secondly, the complexity of adult life situations makes access to education a more demanding task and, therefore, flexibility in terms of rules, preconditions, timetables, place, pace, and study methods is a crucial point of success.

Use of ICT and other distance learning methods are often considered less expensive than traditional means of delivery. Even though there are additional or alternative costs of ICT use, there are obvious possibilities to save travel expenses, room hire, and work time needed for travel etc. when ICT is used in training.

In adult education there are also many barriers to participation. These can be situational (lack of time or money, family obligations), structural (no provision) or attitudinal (no felt needs, no interest, lack of motivation). Active learners are usually able to "overcome" these barriers, but passive adults (who are usually more in need of adult education in objective terms) usually face several obstacles. Flexibility is the key solution to overcoming many of these barriers and many of the projects analysed here provide good examples of how the lowering of thresholds makes access to education easier, even for marginalised groups.

3.3.3   Connection to relevant theories and research

There are at least three perspectives on "flexibility" in adult education:

1) Learner- centred general ideology (Knowles, 1970, 1984, 1985)

2) "Open" learning environments (Manninen & Pesonen, 2000; Manninen, Burman, Koivunen, Kuittinen, Luukannel, Passi, & Särkkä, 2007)

3) Use of information and communication technology (ICT) in education

3.3.3.1 Learner-centred pedagogy

Learner-centred approaches in adult education are usually defined as "humanistic". This approach is traditionally associated with the individual's ego, initiative, self-direction and activity. The humanistic approach to curriculum design, of which Malcolm Knowles' andragogy (Knowles, 1970) is usually quoted as an example (Manninen et al. 1988), is process oriented. Adult learning is seen as a problem-solving process based on the learners' current needs and interests.

Success Factors

The humanistic, learner-centred approach adheres to the principle that the planning process should also take into account minority groups and cultural differences. This does not only mean immigrants and ethnic minorities, but also adult groups which have traditionally been excluded from education, such as lower-educated, working-class men and passive participants in general. A culturally sensitive learning environment that supports the inclusion of each learner should meet the following conditions (Tisdell, 1995, 4):

> 1) It should reflect the diversity of those present in the learning activity itself in the curriculum and pedagogical/andragogical style

> 2) Attend to the wider and immediate institutional contexts in which the participants work and live and

> 3) In some way reflect the changing needs of an increasingly diverse society.

For example, projects like Noste and Steps for Skills were successful because education and study guidance was "taken" into the actual workplace and discussed using language familiar to the learners.

3.3.3.2 *"Open" learning environments*

"Open" learning environment is a "buzz word" which is usually used in a fuzzy way. However, the concept can be used to define different principles which help to analyse the flexibility of adult education provision. Openness and flexibility may be seen as the common denominator in 'new' educational practices, i.e. in practices influenced by constructivism and a humanistic approach. These practices usually have the following principles in common (Manninen, 1998):

- student-centeredness and a lack of any obvious curriculum (e.g. education based on the individual's life situations and needs, constructivist building of knowledge, process-centeredness)

- application of diverse teaching methods instead of teacher-led classroom instruction

- connecting the learning environment to working life and real world situations, e.g. by means of on-the-job training

- greater reliance on guidance practices which support the student

- the ideal of the learner's own activeness and self-direction

Table 2 describes how an open and flexible learning environment can look in practice and which elements are usually present in a learning process emphasising flexibility. The table is based partly on the distance learning model proposed by Paulsen (1992) and Jarvis's model of self-directed study (Jarvis, 1990).

Success Factors

Table 2. Aspects of the learning environment in the closed-open dimension (Manninen & Pesonen, 1997; Manninen, Burman, Koivunen, Kuittinen, Luukannel, Passi, & Särkkä, 2007

	CLOSED		OPEN, FLEXIBLE
MOTIVE	external	⇔	internal
DECISION TO PARTICIPATE	based on obligation or social or economic oppression	⇔	based on free will
FORMAT OF STUDY	course	⇔	self-study
OBJECTIVES DEFINED BY.	trainer, training or work organisation or society	⇔	student(s) themself/themselves
TIME	based on fixed timetable	⇔	flexibility of time, studying with own timetable
PLACE	studying takes place in one place	⇔	flexibility of place, studying possible in several places
CONTENTS	common to all	⇔	individually tailor-made
CONTEXT	Training organisation	⇔	reality
RELATION TO REAL LIFE	missing	⇔	created through problem- or project-based learning
ACCESS	students are selected, entrance examination	⇔	open to all
PACE	pre-defined with deadlines	⇔	self-defined
STUDY METHODS	only one means of delivery or study method	⇔	several alternative study and delivery methods
COLLABORATION	studying alone	⇔	collaborative and co-operative learning in groups
ASSESSMENT	by trainer	⇔	self-assessment

Certain choices such as didactically effective group-based study are restrictive in other elements, for example, in the pace of study, timeframe, content and place because a group normally has to gather in the same place at the same time and study the same things at the same pace. Furthermore, individually determined learning targets and course-based implementation are very hard to achieve in practice. A completely open and flexible study process is, therefore, very difficult to achieve, and it is not the best didactical solution. (Manninen, Burman, Koivunen, Kuittinen, Luukannel, Passi, & Särkkä, 2007, 31.)

3.3.3.3 Use of information and communication technology (ICT)

The use of ICT in education is an old research and development area ranging from the first radio broadcast and correspondence courses (Verduin & Clark, 1991; Rowntree, 1992) to more modern applications of ICT (Manninen, Burman, Koivunen, Kuittinen, Luukannel, Passi, & Särkkä, 2007, 73-90) and Blended Learning in Education (Bonk & Graham, 2006).

Surprisingly, only a few projects in these analyses (in our data) used ICT extensively to create flexibility of access.

There is a lot of literature available on this topic and interested readers are directed to use these resources for further information (Manninen, Burman, Koivunen, Kuittinen, Luukannel, Passi, & Särkkä, 2007; Matikainen & Manninen, 2000; Gammelgaard, 2010; Yu, Tian, Vogel & Kwok, 2010).

3.3.4   Recommendations

Adult education initiatives should always have flexibility included as a guiding principle because adult learners have very individual learning needs and rather complex life situations, Flexibility is, therefore, needed both in terms of contents (tailor-made packages and objectives) and study methods, which should enable participation in various life situations.

3.4   Focus on needs

> *A programme focuses on authentic regional, sectorial or individual needs and problems which are recognised and systematically analysed providing tailor-made solutions.*

A success factor which is evident in most of our cases is that they are created to meet real needs in a specific setting. Usually the project team or the project initiators successfully assessed the learning or development needs of their target group. This implies cooperation between relevant stakeholders such as members of the target group itself, unions where individuals in the target group are members, associations of employers, relevant government agencies or ministries and educators working with the target group. These stakeholders have - through variously systematic assessment processes - identified the needs intended to be met by the project.

3.4.1   Examples from our data

In general, we could state that the projects we analysed were usually created in order to increase competencies of a specific sector of society which was experiencing situations of change, crisis, unemployment, emigration etc. New skills pertinent to a job situation and new or increased competencies were in all these cases seen as a way for individuals and groups to meet the challenges at hand.

Some of the projects operate on a policy or national level (Noste, ETSC, Guidance and counselling). Players on the national level have determined that a portion of the population needs new opportunities to increase its education, skills and competencies:

> *A clear need to raise the educational level. The situation of the least educated group was deteriorating on the labour market, as highly educated young people continue to enter the market. For adults in employment, completing a post-basic education qualification has enhanced their position on the labour market and created a foundation for updating their skills. (Noste, Finland)*
> *The aim of the project is to develop competence throughout the country by boosting the educational level of people with little formal education. [This is done] through projects and structures which support regional players to carry out counselling and to attract learners to Lifelong Learning programmes. ETSC´s connection and status vis-á-vis regional planners are reported to have been inspiring. (ETSC: The Education and Training Service Centre - Iceland)*

In these examples the needs can be defined as both individual needs and needs of society - for the greater good of society as a whole. Many agree that a higher educational level creates both the foundation for an equitable democratic society as well as a healthier work market. Human capital theories argue that a higher level of education leads to greater earnings for individuals and wealth for society as a whole (cf. Becker, 1962). This has been at least partly supported by various studies, for example from the OECD (OECD, 2011).

Similar ideas can be attributed to projects which address *local needs* (Esedu, Suðurnes, Stronger Community, Vincent). These tend to be reactions to specific local changes in employment and population movements. These projects have a clearer focus than the national ones and they describe *local* needs and *local* situations which must be addressed in *local* ways.

> *This project deals with a local crisis, when c.a. 1000 people lost their jobs in a short time. The community called relevant stakeholders together in order to create a response to help people living in this area who had just lost their jobs. The needs of the unemployed people this project aims to support were analysed. Many of these had been working for the same employer for many years and had very little formal education but had acquired many skills through their work. (Suðurnes)*

> *The project takes into account the special features of the area, local and regional planning and needs of the surrounding working life. The activities follow the challenges of the region;: the lowest educational level in the country, and the fact that the number of employees needed will increase because of the high retirement rate and young people moving outside the region to seek jobs (Esedu).*

Projects which have regional or national reach tend to address general educational goals like "raising educational levels". People who have a "low level of education" are seen to need more education or a higher level of education is seen as a way to meet other needs. Sometimes the need is felt and acknowledged by individuals and sometimes the need can be seen as a need of society; in order to have a mobile and adaptive workforce, a society needs to ensure that a large portion of society has acquired a sufficiently high level of education in order to proficiently complete the tasks required in industry. Moreover, a society with a flexible or mobile workforce is seen to be more resilient and adaptable to change. So by raising the general level of education, society's needs for a competent and flexible workforce are being met. This, of course, does not always fit with individual needs and wishes. Individuals do not always see their fate with the same eyes as policy makers or administrators.

The needs met by our projects become more diverse, specific and focused in projects which address specific industries. These range from meeting patients' rights by educating health personnel (Kollegial Vejledning) to increasing transparency and comparability of potential workers' skills in order to make the recruitment of staff more effective (Vincent) and strengthening the situation of current workers with much experience but a low level of formal education (Value of Work). Here we find that the needs and interests of various groups are met through education or validation of skills or both. It is interesting to note that the needs are not always attributed to the learners, but also to their clients.

> *The project focuses on psycho-education as a form for the meetings between care givers and patients instead of focusing on formalised educational classes for patients. In this way the project meets requirements of a new legislation which dictates that schizophrenic patients have a right to be given insight into their illness. A core point is that the education takes place in the informal and open meeting between caregivers and patients. Interviews with patients and relatives at the beginning of the project showed that the participants had such diverse learning needs that traditional patient schools would not be able to meet them. (Kollegial Vejledning)*

It is thus clear from the project descriptions that the projects are created in order to meet *needs* of various kinds – individual, local or national. It also seems evident that clearly stated needs which are experienced as *real* needs by most, if not all stakeholders, are factors which can be deemed as critical to a project's success.

3.4.2 Why is this Success Factor important?

Needs assessment is an activity people often undertake before starting larger projects and educational interventions. In most models for programme design, needs assessment is seen as the first step of many, albeit a vital one, where information is gathered which subsequently is used to articulate programme aims, goals and objectives.

The fact that a project which is created to address specific, authentic needs is more likely to be successful (or more successful than others...) can be explained in various ways. If a project is to reach its goals it needs to attract people who use the goods the project intends to offer. It is, therefore, of paramount importance that the project actions address a need which a substantial portion of the population (the target group) agrees it has and is willing to use some energy to acquire.

The most obvious reason why this success factor is important is probably the fact that if the project meets a real need, the beneficiaries will use the service offered and give positive feedback, encouraging those involved in the project to continue. This is important because one of the reasons governments create project funds is the belief that the projects will in some way make life in a specific society better. So if the project does *not* meet a need in society there is no reason to carry it out.

3.4.3   Connection to relevant research

The term "need" usually refers to the original idea of (1) a **biological need**: "humans need food to survive", "plants need water to grow", etc. Other types of needs are (2) **social needs**, which refer to a human being's tendency to feel better if he/she has social contacts to other human beings, feelings of trust and support as well as self-expression and self-fulfilment; "humans need social contacts to stay mentally stable". The third type of needs, (3) **normative needs**, are based on the individual's situation and role in society; "adults have to study in order to...". Training needs are an example of normative needs. Also, a distinction between the qualitative (what?) and quantitative (how much, for how many?) dimension of the needs has to made.

Stakeholder satisfaction (whether or not a project meets the needs it was designed to meet) is usually considered a criteria for successful projects. In a recent review of project management "bodies of knowledge", Terry Cooke-Davies (2002) revealed "anticipated benefits" as the "touchstone" for the success of a project. This finding is definitely in line with our findings if we define benefits as the fulfilment of needs. A project is therefore seen to succeed if it delivers the anticipated benefits, and thus meets the needs it was created to fulfil. Furthermore, Cooke-Davies (2002) found that a critical factor of project management was a process which ensures clear communication between beneficiaries and project management. In our cases this could mean both a good common understanding among all stakeholders of the needs to be met and open communication about these issues between all levels of the project.

In another recent survey the top two project success factors were also related to needs: (1) "Make the added-value visible, and (2) "Make the benefit of a product clear"(Kirschner, Cordewener, Paas, Wopereis, & Hendriks, 2004). Added-value and benefits should be considered to be equal with meeting real needs. It is unlikely that stakeholders will experience added-value and benefits as useful or worth-while if they do not meet some experienced need.

Research on what motivates people to do certain things, like learning, can also shed a light on our question. Motivational theories predict that people are motivated by various "needs". Abraham Maslow (1954) published a hierarchical list of five basic human needs: Physiological needs, Safety, Belongingness / Love, Esteem and Self-actualization. Since then many have published variations on that theme (cf. Alderfer, 1972; McClelland, 1976). According to these theories, people are motivated to action on the grounds of their needs or desires. Likewise, learning theorists such as Carl Rogers (1994) and Knowles (Knowles, Holton, & Swanson, 2005) suggest that people are willing to learn new skills if and when they feel a need for that skill. Thus for a project based on helping adults learn new skills to succeed, the skills and competencies people can acquire by participating in the learning activity must be ones the target group experiences as a real need, worthy of their energy.

3.4.4   Recommendations

- Build projects and programmes on sound assessment of the target groups needs
- Involve stakeholders in the planning process
- Communicate regularly with the beneficiaries of the project and users of the intervention
- Be clear about whose needs are to be met

Probably the most influential factor regarding the success of a project is that it addresses real needs, and that these needs are also recognised by the target group. A project which aims to offer a service to people who do not feel the need for it is doomed to fail. It is thus of paramount importance before embarking on such a project that the initiators have a clear idea of what needs they want to meet with the project, and that they are sure that the target group also feels the need to meet them. Moreover, the benefits the target group is supposed to get from using the project's services need to be communicated clearly on all levels of the project and most of all to the beneficiaries.

Feedback from participants at our midterm conference confirmed this recommendation and stressed that learning interventions built on "one-size-fits-all" philosophies and which neglect to bring the voice of the user into the planning phase are destined to fail or at least be of mediocre value.

One critical observation from our analysis is that hardly any project (or project description) included a systematic needs analysis process. This might be explained by the fact that in most cases the "need" seemed obvious (for example, a factory or another major employer shuts down), or generally recognised by the society (educational

level should be higher, and therefore there is a need to develop APEL procedures in projects like Noste and SKTC). Therefore, organisers felt no need to do detailed needs analysis "by the book". In some projects the needs analysis was replaced by an idea or a vision (for example Design in Metal and Kunstgreb).

However, it is suggested that a more systematic needs analysis should be conducted in future projects.

Even though the precise measurement of needs is difficult or even impossible, it *is* possible to use qualitative methods in needs analyses rather than quantitative methods. For example, a **Focus Group interview** (Barbour & Kitzinger 1999) is a method where the interview is conducted with a group of people who are asked to discuss the interview themes during the process. The method is useful in situations where we need deeper information about the topic or want to find explanations. The aim is not to produce consensus between the members of the group, but to bring out different opinions, values etc. concerning the topic.

A similar method is the **Stakeholder Approach**. Here needs analysis is based on the principle that various interest groups get their opinions heard in the process. A stakeholder is usually defined as someone who has a "stake" in the process or in project. A stakeholder is anyone who:

- Is directly or indirectly impacted by the project solution

- Has an interest in the outcome of the project

- Is a primary source of requirements for the project

- Will perform one or more activities during the delivery of the project

- Imposes constraints or boundaries for the project

- Is responsible to the organisation for the success of the project

The stakeholder method is based on the idea that all those who are somehow involved or influenced by the project or programme are stakeholders or beneficiaries and should have a say in the needs analysis process. Different stakeholder groups are interviewed or given an opportunity to fill in questionnaires and give feedback.

In future-oriented programmes, needs analysis is often conducted using Delphi and other anticipation methods. The aim of the **Delphi–technique** (Linstone & Turoff, 1975) is to get an opinion which is as accurate as possible on given questions from a group of experts using sequential questionnaires and controlled feedback. Data is collected and analysed in several rounds so that the results of the first round are given to respondents for comments, and so on. The aim is to generate an informed collective picture or definition of future trends, based on the visions and knowledge of selected experts and professionals.

For further reading on methods see for example:

> Hróbjartur Árnason & Stig Skovbo. (2010). *Training Needs Assessment. An inspirational HandBook for designers of learning processes. Strategic capacity building in companies and institutions - the first step* Reykjavik. View at: http://www.vuxped.nordvux.net/kogebog_vers.1.0.pdf

3.5 New role for institutions

The project includes innovative new roles for training organisations which have traditionally been working in different fields of education.

In eight of the projects surveyed we noticed the fact that the participating institutions took on new or other roles than those they usually exercise. This had positive effects on the project and seemed to contribute to its success.

3.5.1 Examples from our data

Two projects involved schools which took on new roles vis-à-vis their learners and clients. In the FLOW project a traditional Adult Education Centre (VUC) in Denmark offered courses to young high school dropouts built on methods and content similar to those you usually find in so called "Folk High-Schools". So here we have a traditional adult education institution taking on methods stemming from a completely different tradition in the Danish

educational scene, namely the much freer and more open Folk High-School tradition. In Sweden it was in a sense the other way round - five Folk High-Schools partnered with local businesses to offer professional development for staff in local SMEs using face to face meetings and e-learning methods. Thus, the Folk High-Schools continued to use their methods and philosophy but in a new setting, that of training and professional development:

> *"Folk high-schools are usually considered as liberal adult educational organisations, but in Vincent they have taken on the role of business developers."(Vincent)*

Similarly, the Iðan learning centre tried out new pedagogical methods by offering courses in collaboration with companies in a specific field and handing the success of the course in many ways over to the participants. Usually people come to Iðan for a short teacher-led course; in this case they were trying new pedagogical models.

> *Iðan - vocational centre, usually offers courses, counselling and validation of prior learning. Now they tried out a new pedagogical role of facilitating a self-determining group of learners who were made responsible for their own project.*

In two cases we see new institutions or departments which influence and change how other organisations work. In Iceland the Education and Training Service Centre (ETSC) has the task of introducing and creating new practices and structures, thus, through its various activities, products and the way it finances projects, Lifelong Learning Centres are forced to change their practices. In a similar but more restricted way, CNC Teknik influences hiring practices as well as qualification paths available to people working in the metal cutting industry in Sweden.

> *The ETSC has been active in initiating innovation and quality in the country's Lifelong Learning Centres. In some cases this has led to new roles and tasks for the institutions, such as counselling and validation. It has actively nudged traditional upper secondary schools, both academic and vocational, to recognise prior learning of adult learners. (ETSC)*

An example of institutions taking on new roles due to influence from the above mentioned organisations is the "Guidance and counselling in the workplace" project. Here Lifelong Learning Centres started hiring study and career counsellors and instead of posting them behind desks in offices, sent them out to the people they were to serve, so suddenly the institution was sending its staff out to the target group and the counsellors found themselves in the new, unfamiliar situation of being the insecure visitor who came to offer his/her services.

> *The institutions did not employ counsellors before. Study and career counsellors found themselves in new situations now dealing with adults and not in their cosy office, but out in the cold, by the gas pump or in the fish factory's canteen. Their work creates a new dialogue within the institutions.*

Finally, two Danish programmes invited stakeholder institutions to create new ways of approaching professional development and change. Kunstgreb offered artists, the artists' union and hosting companies' new roles, when the union participated in the project.

3.5.2 Why is this Success Factor important?

New roles can help organisations to change and evolve. One of the reasons people embark on projects like the ones we have been studying is to "offer education to help society meet challenges, opportunities and change". Change is something humans tend to refrain from if they can. When individuals and people in organisations find themselves in new situations and taking on new roles, they tend to have an opportunity to change their behaviour and their attitudes. One might say that if an organisation is already dealing with a new role, it seems logical to suppose that it would be easier to change practices and invite innovation into the practice. Practices tend to become petrified in organisations and change becomes difficult. By introducing a project which invites an organisation to take on a new role, stakeholders probably feel insecure about themselves; they have to find new ways to do things. It could be argued that because the organisation is dealing with a new role, other practices could easily be changed at the same time or consequently - since they have already created new practices, why not change some obsolete ones too? Inviting an organisation to take on a new role can directly or indirectly help it to change obsolete practices and make other necessary changes easier.

A new role can also help an organisation to do its best. When an organisation finds itself in a new role, people need to rethink and decide how to go about their business and carry out their tasks. In a new situation people will tend to do their best. However, although routine can lead to consistency and quality, it can also evoke mistakes or laziness. From this point of view, being in a new role could motivate people in an organisation to do their work with more care, thus ensuring the success of the project.

3.5.3   Connection to relevant theories and research

For most people and organisations a new project is a challenge and a learning project. Learning theories can thus give us some interesting aspects by which to analyse this success factor.

The Russian psychologist Lev Vygotsky is perhaps best known for framing the concept of a "Zone of proximal development", which denotes an area where a person can develop abilities which he or she does not possess but could learn with some support. This idea is closely related to the idea of being pushed or nudged out of one's comfort zone into the unknown. By creating projects where stakeholders and participating organisations find themselves in new roles, you are very likely giving the organisation an opportunity to develop further through this new learning opportunity.

Having to deal with new roles can force people and organisations to reconsider beliefs, attitudes and even practices. If the learning experience is taken seriously and stakeholders allow themselves to tackle the problems, dilemmas and anxieties which can accompany travelling in uncharted territory, things can change. Transformative learning theory (Mezirow, 1991; 2003) predicts that such events can lead to the questioning of beliefs, values and practices. Given the right conditions, the new role can offer an opportunity to critically engage with the current state of practice in an organisation.

We can thus conclude that designing projects where partnering organisations need to enter into new roles can inspire them to do their best because they approach the project from a fresh vantage point, instead of doing "more of the same". Likewise, this can be an opportunity for learning and development for the organisations themselves and for the individuals who carry out the work. This can improve the projects themselves.

3.5.4   Recommendations

Be bold. Design the projects in such a way that your organisation and partners need to do their jobs in other ways than you are used to. Try new methods, models and create new practices by using the project as a pilot study for new ways of addressing old problems.

3.6   Getting new groups involved

The programme motivates new groups of participants who have usually been non-participants, or are a new target group for the training organisation. Aiming at new groups fosters innovation in the training organisation.

The Success Factor "Getting new target groups involved" covers both projects aiming at including groups of participants who haven't traditionally participated in any formal or workplace-based learning activities **and** projects which imply that the training organisation has to work with groups of participants who are new to the organisation. The involvement of new groups of participants can be successful both from the perspective of the training organisation and from the perspective of the participants. From the perspective of the training organisations the potential "market" for their learning activities is expanded; for the participants, who are often lower-educated or at risk of losing their job, involvement betters their career-possibilities and strengthens their position in the labour market.

At a societal level, including lower-educated groups in learning activities is necessary in order to meet the need of companies for a competent workforce.

At the same time it seems that the intention to include new groups of participants forces training organisations to think in new ways when it comes to both pedagogical methods and curricula. Including new groups fosters innovation.

3.6.1   Examples from our data

A number of projects involve groups of learners with little formal education. Noste and ETSC are large-scale examples of this kind of project.

In Noste the target groups were lower-educated and older workers, who are traditionally passive when it comes to learning and difficult to motivate (ex. Illeris 2000, 2003). Educational institutions were compelled to develop new operational methods in education to catch up with Noste. The most efficient outreach method has been a combination of various operational methods that included going into the workplaces and conducting face-to-face discussion with the target groups. The Central Organisation of Finnish Trade Unions (SAK) has also contributed to the outreach activities through training competence pilots. These peer counsellors worked in work-places.

The Education and Training Service Centre, ETSC: Target groups touched by the ETSC have been administrators in LLLCs, teachers, and the target group of learners with little formal education. These groups have not been addressed with the aim of increasing their competence in such a systematic way before. The target group of the ETSC currently numbers approximately 45.000 individuals, including people in the labour market with little formal education, drop-outs, immigrants and other groups with similar problems.

Similarly, the projects A Stronger Community and Guidance and Counselling in the Workplace (on the labour market) address the group of participants who do not usually take part in adult learning offerings, and is aimed especially at people with little formal education. Guidance and counselling in the workplace is part of a new (since 2003) emphasis in Iceland on elevating this target group's level of education nationwide.

In other projects the target group is well known but not for the training organisation in question.

The Swedish project Vincent targets SMEs and low-skilled managers who are a challenging and non-traditional target group. Vincent managed to attract participants by contacting potential target organisations. The SMEs and low-skilled managers are a new target group for the learning institutions, which are traditional folk high schools.

> *In the Vincent network there are five folk high schools who have taken the responsibility to be the regional schools in each region of Sweden. In each region, work is done to increase the regional network of folk high schools able and willing to conduct the Vincent programme. The Vincent programme gives the schools a new target to work with and this should be important especially for the schools in regions affected by a crisis. The philosophy is to strengthen the regional companies. The school should be a centre for power in order to stimulate the number of employees and a positive development of the region itself. (Vincent)*

Folk high schools have traditionally seen it as their task to develop the general education of their participants, but the schools in the Vincent network took on a new role as co-operators for private regional companies with the aim of strengthening their position.

In addition, CNC Teknik 2010 targets SMEs and low-skilled managers. By the end of the 20th century the internationalisation of industrial life and society had reached its peak. In many places in Sweden you could see privately owned companies being sold to investment companies, others were bought by international owners and many Swedish companies moved all or part of their production to low-wage countries. New techniques were being introduced and the demand for well-skilled workers became obvious. One could see that the traditional forms of education were not enough. Learning at the places of work and new methods to integrate learning were developed. The increase in learning also meant that the demand to describe the tacit knowledge which was the base for many skilled workers increased.

The aims to educate the staff lead to the invention of a new validation and certification system. The SKTC Model, which today is CNC Teknik[2010], is a method developed by Skärteknikcentrum to systematically build a system for validation and certification for the metal cutting industry in Sweden. It describes how representatives for a specific sector (the metal cutting sector in a systematic way form, introduce and perform a validation and certification system to ensure skills. After validation the programme offered individualised learning.

Kunstgreb combined the education of artists and practical training in companies. Artists are often at risk of unemployment or live by short-term hiring. They might not belong to the group of the lower-educated in the workforce, but are still at risk of marginalisation. For the Danish Artists' Union the role of establishing cooperation

between artists and companies was new. The union has been in charge of courses for its members, and this project expanded the contacts and network of the union as a learning institution to a new sector of society; the private companies. Being involved in facilitating positions and developing areas of tasks for a specific artist in a specific company was a new role for the teachers, who became counsellors or coaches.

The Danish project FLOW gave folk high school admission to a group of unemployed young people who seldom find their way to the traditional folk high school evening courses. Working together with this target group forced both the VUC and the folk high school to think and organize teaching in new ways: for example the course lasted one year longer than normally and the curricula were broadened. It is very important to involve this target group; at the moment approximately 20% of youth in Denmark leave public school with no further education (Arbejderbevægelsens Erhvervsråd 2011).

3.6.2   Why is this Success Factor important?

The involvement of new target groups can be seen as important from at least three perspectives. At a societal level motivating groups of participants who have usually been non-participants in learning activities contributes to raising the general educational level of the population. It is a central basic understanding in several of the described projects that a low educational level especially among manual workers and in SMEs is a threat to both the individual worker and to the enterprise. In a globalised age, workers and companies in the western part of the world have to compete with the rest of the world. If we only compete in terms of wages, we are in a difficult position, but in terms of knowledge, education and certification of knowledge the Nordic countries have important resources. Globalisation means that products and services created in our part of the world must be competitive in quality, design and innovation (Mandag Morgen/Nordisk Ministerråd 2011).

To be able to do this, we need a well-educated workforce. As many statistics illustrate, the so-called "restgroup", those who don't get a basic youth education, and the unskilled workers are hit harder by unemployment than other groups in society (Arbejderbevægelsens Erhvervsråd: 2011). This is of course a problem on an individual level, but it is also a problem on a societal and economic level.

In the description of the goal of the ETSC project the importance of educational level for the economy of Iceland, for example, is explicitly put forward:

> *Around the turn of the century there was a vigorous discussion within the Icelandic Confederation of Labour on the educational level of the labour force in Iceland. Figures from Iceland Statistics indicated that almost 40% of the labour force had not completed upper secondary school. At the same time international comparison revealed that the educational level in relation to that school level was much poorer in Iceland than in neighbouring countries. In the debate on education within the Union, raising of the educational level was emphasised in order to strengthen the economy of Iceland.*

In the so-called vision of *Kunstgreb creative thinking and innovation is coupled with economic growth and development:*

> *(Kunstgreb) aims at optimising the human resources in Danish business life as a whole. Kunstgreb is the centrepiece providing business life with new ways of development by educating artists and companies to understand and embrace creative thinking and innovation which is the only sure way to any form of growth and development.*

Education, and especially education aiming at developing creativity and innovation, is crucial for individuals, companies and society, as it constitutes a cultural and educational capital which can be changed into economic capital. Including all groups in education and thereby creating easier access to the labour market is important in order to assure internal coherence of society. In times of crisis the welfare systems of the Nordic countries are, of course, under pressure. In this situation the conscious aiming at involving low-educated groups in adult education is important if we want to prevent our societies from being more socially divided than they are now. A high unemployment rate means further pressure on state resources and a demand for prioritising the use of the welfare benefits. In this situation the solidarity which has been characteristic of the Nordic populations is not guaranteed.

For the training institutions the involvement of new groups of participants means new tasks which often force the institution to develop and apply new methods. In this sense involving new target groups facilitates innovation at the institutions, and it provides alternative job and learning opportunities for the staff at training institutions. The teachers from the folk high schools involved in Vincent, for example, had to work in a new sector, involving different learning methods from the usual ones.

Noste and ETSC implied that counsellors from the training institutions went to workplaces and engaged in direct contact with managers and staff. The knowledge and trust created in such interactions can be seen as important ways to build up the social capital of the learning or training institution.

From the point of view of the (typically lower-educated) participants taking part in learning activities they are potentially bettering their position in the labour market and reducing the risk of unemployment. Getting ones skills confirmed, acknowledged and certified, which was one of the goals in CNC Teknik, can at the same time be of value when it comes to personal identity and self-esteem. As described by Wenger (IN: Illeris, 2007) "learning is an interaction between (…) socially defined competence and personal experience."

Strengthening of personal identity, self-esteem and increasing job possibilities are aspects of learning activities which go hand in hand in projects such as FLOW, Kunstgreb, A Stronger Community and Noste. These projects are very different and all successful, which points to the importance of a differentiated adult educational sector. A sign of the strength of Nordic societies are the variety of educational offers, several entrances into education, a tradition for both formal education and folk high schools, evening classes conducted by different interest organisations, etc. The projects draw in different ways on these structures and traditions.

3.6.3 Connection to relevant theories and research

In the report "Uddannelse kan redde fremtidens arbejdsstyrke" (Education can save the workforce of the future), written by the Danish Arbejderbevægelsens Erhvervsråd in 2011, it is stated in the introduction:

> "Denmark's future growth and welfare are not to be taken for granted – growth and welfare have to be created through a far-seeing and goal-oriented aim at a better educated workforce which is ready to deal with the challenges of globalisation – if the educational level of the workforce isn't crucially raised, there will be a surplus of more than 180.000 unskilled workers on the Danish labour market in 2020." (Translation by the authors).

One of the focuses in the report is on education and on the enormous gains which education offers for both the individual and for society. According to the analysis of the report, the problem in the next 10 years will not be lack of hands, but lack of educated workers, both skilled workers and highly educated workers. The tendency in all the Nordic countries will be for unskilled jobs to move out of the region. In this perspective the many youngsters who don't get an education will be a huge problem.

The gains of education are documented in the report in several aspects. For individuals, education results in increased income over their lifespan, and for society, education provides closer attachment to the labour market and higher productivity. Likewise, education has a positive influence on health; educated citizens' use health insurance benefits less often and take far less medication than unskilled citizens.

From stating the needs to actually motivating lower-educated people to participate in learning activities is a long journey. The National Centre for Competence Development in Denmark works with, among other topics, the question of how the resources of the lower educated groups in the workforce can be developed through learning activities. In their work, for example, the report "Læringsformers betydning for voksnes motivation for læring", researchers from the centre discuss different forms of learning methods and their success in reaching lower educated groups on the labour market, either in school settings or in learning at the workplace activities. The lower-educated often have bad experiences from their former schooling and therefore react negatively towards educational offers as adults.

According to the Swedish researcher Helene Ahl (Ahl 2004), one can use the concept "motivation" as a relational concept (cf. Høyrup Pedersen et al. NCK 2009). In this light the relationship between lower-educated participants and the form and content of learning activities offered to them becomes the focus of interest. Motivational problems and participant behaviour are thus an expression of the relationship between human beings and their social context (Illeris, 2006).

Success Factors

Against the background of Scandinavian research, Høyrup, Pedersen et al. (2009) propose a triangular model for effective learning models for the lower-educated:

Supportive
learning methods

Challenging
learning methods

Motivation

Connecting
learning methods
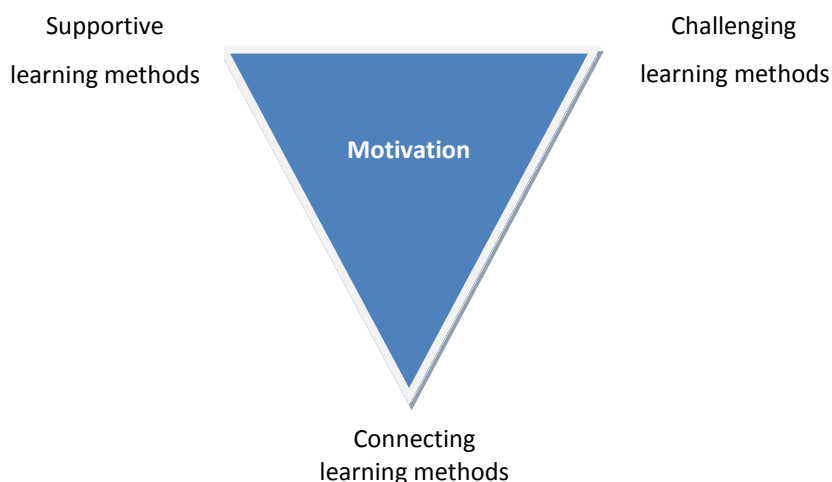
The point of the model is that to maintain and create motivation, different methods which meet different needs among the participants have to be applied in the learning situation.

Starting from the bottom, participants need to experience that the learning activity is meaningful. The concept "Meaningful" used here is described by Antonovsky in his theory of Sense of coherence. Sense of coherence consists of three dimensions: *comprehension, manageability and meaningfulness*. Coherence is achieved when the individual feels that challenges are to comprehend, to manage and make sense. In connection to learning, participants must be able to see a connection between theory and practice. The category covers forms of learning which include the life perspectives and experiences of the participants and offer possibilities for reflection, clear goals and interplay between situations far from and near to practice. Supportive learning methods and challenging learning methods refer to the contradictory interest in the human being of regression and progression (Ziehe & Stubenrauch, 1983). This psychoanalytically inspired concept describes how human beings constantly interchange between seeking new challenges and sticking to routines. If the learner experiences an imbalance between the two poles the result can be anxiety, which in the end can lead to the participant leaving the learning activity.

Looking back at the project examples it is obvious that in at least some of the projects new methods for motivating and engaging participant were developed which met the various needs of the target groups.

In Noste representatives from the learning institutions went to the workplaces and conducted face-to-face discussion with the target groups. This can be understood as a way of creating a connection between workplace and learning institution for the target group. It can also be motivating since meeting face-to-face can be understood as a way of creating trust – and thereby supporting the participants in daring to engage in new activities.

In Kunstgreb teachers took on a new role as counsellors or coaches and thereby worked on an individual level to prepare the artists for working with the companies. This was also a way to support participants in establishing connections between the companies and the learning process.

3.6.4 Recommendations

Design the project in such a way that it aims (also) at including groups who haven't traditionally participated in learning activities in general or in learning activities organised by your institution or partners. Try new methods and models for reaching these groups and gaining new inspiration for your institution.

3.7 Community as pedagogical strategy

> *The pedagogical design of learning interventions aims at creating a sense of community between participants.*

Learning is defined by many as a social activity. Community is a basic component of human existence, and at some levels people seem to thrive better if they feel they are part of a community. Organised learning events usually involve gathering groups of people together in the same place (physically or virtually). This is presumably done for more reasons than addressing many people at once. Presumably, we expect some other learning benefits by gathering people together at the same time and place. However, often the organisation of an event does not include activities which facilitate communication between the learners who are gathered together in the same space. Our analysis of the examples revealed that successful projects incorporated a pedagogy which facilitated interaction, sharing of experience and other discussions between participants and aimed at creating a sense of belonging and reciprocity.

3.7.1 Examples from our data

Our data includes various examples where this sense of "creating a community" was an important aspect of the project's success.

Supporting *ownership* of the learning activities can contribute to participant cohesion and engagement in an activity. This was a strategy applied, for example, in the following way:

> *The project belonged to the group. If they did not attend, the project would die. The pedagogical design of the project built on self-determination of the learners, group work and ownership. This usually leads to the creation of a close-knit community, where people help and support each other. (Design in Metal)*

In this case ownership of the project was clearly handed over to the participants, and their actions or inaction had a direct effect on its life. Other projects also built their success in part on such pedagogical approaches where collaboration and community aspects were emphasised throughout the project. This is generally seen as being important for the success of a learning activity, and even more so when addressing groups of learners with a low level of education and/or negative experience of traditional, competitive school culture.

> *Learning was organised in such a way that it could take place with colleagues and leaders in the workplace, thus helping learners to connect in new ways with colleagues at work and discuss with them what they have been learning. (Steps for Skills)*

> *[Suðurnes] is a community project [designed] to help a specific group of people reintegrate into the labour market. Elements of creating community in the classroom [were intentional design elements of the program]. (Suðurnes)*

> *The aim of the project is - through interesting learning opportunities - to boost self-esteem and offer possibilities to deal with change in the work market. Elements of creating community in the classroom. (Prisma)*

Another aspect of community in the learning group is when learners help each other, support each other's learning by giving feedback and create elements of discipline and a forum to discuss ways to implement the learning into their current situations. The project Kollegial Vejledning is a good example of this:

> *For the staff the project offers collegial supervision and tries to create mental ownership. This is important in a clinical practice characterised by sickness, absence, resignations and dismissals. For schizophrenic patients the project expects to increase their ability to cope with a chronic disease through peer support. (Kollegial Vejledning)*

In this example both caretakers and patients were involved in the learning process. Caretakers supported each other's learning with methods of collegial supervision, helping each other to change their behaviour. Moreover, instead of offering useless "information evenings" where caretakers "pour" a lot of general and irrelevant information in to the patients, the caregivers offered guidance, support and supervision to their patients when and where they needed it, thus using "teachable moments" to help the patients learn important aspects of their sickness and how to cope with it.

Another way of using community as a design element in the projects we surveyed was to connect learners with new and even unexpected groups, challenging them to learn from the interaction with people they would usually not expect to work with.

> *Bringing together artists and business people, creating new contacts and getting them to work together. Support for networking between artists and other companies. (Kunstgreb)*

This method appeared in another context where learners and providers were able to meet at a "central meeting point":

> *The project creates a central meeting point for SMEs and establishes contact and supports networking between local SMEs and training institutions. Both on the planning level as well as between participants. Using both conventional means as well as new media. (New Waves)*

> *By creating a one-stop centre for education and training for a segment of enterprises in Turku and initiating and supporting networking between people in new and growing SMEs. (Potkuri)*

These projects offered safe environments and social structures where people who would normally not learn together or discuss possibilities of working on joint ventures could meet, share experiences and learn from each other, thus creating new possibilities for all involved.

In a similar way The Education and Training Service Centre in Iceland serves as a meeting point for people working in the relatively new field of adult and continuing education in Iceland:

> *ETSC's main activities have focused on creating material and processes, however, through semi-regular meetings, workshops and symposia the organisation manages to create contacts between people working in the field. This can be seen as a factor which supports the organisation's goals and motivates people working in direct contact with the target group to do better. (ETSC)*

It is a usual and well-known practice for learning to be organised for smaller or larger groups who gather in the same space and time. However, it is not evident that aspects of creating community and facilitating exchange are by default part of a project's design. But this does seem to be an element which contributed to project success, which in itself is not surprising.

3.7.2   Why is this Success Factor important?

Theorists and practitioners generally agree that learning is a social activity (see for example social learning theories, constructivist learning theories and theories on communities of practice etc.). People learn many of the most important things in life by mimicking and copying other people. This is, for example, how we learn to walk and talk, but it is also how we learn the culture of our workplace. This is also the reason we gather people in groups to help them learn; the learning experience is deepened when learners see and hear others learn, try out and adjust behaviour through feedback from teachers and peers.

Theorists have written about the social aspects of learning throughout the last century in great detail. Most prominent are people like Lev Vygotski (1986; 1978) who described how each learner constructs his own images, models and theories about the world through his interactions with others. Likewise, a society in itself can be seen as "learning" and creating social artefacts such as "manners". Thus, other aspects of culture and reality are seen as being constantly constructed socially (Berger & Luckmann, 1991).

If one takes these ideas to heart, organised learning events should be more effective if they include various types of communication between the learners, allowing them to share and compare their views and experiences of learning.

Moreover, research on learning motivation indicates that a sense of belonging is vital to an individual's motivation to learn (Wlodkowski, 2008). This also ties in with what many humanist theorists such as Carl Rogers proclaimed; that a prerequisite for learning is feeling safe in the learning environment (Rogers & Freiberg, 1994). By creating a sense of community in the learning group one can create a sense of inclusion and safety, thus releasing energy which allows participants to focus on the learning experience.

We have seen, both from our examples as well as from some of the most influential learning theories, that when learning projects are designed in such a way that activities and structures which create a sense of community and belonging are integrated into the projects, they are more likely to be successful. People generally enjoy other people's company, are curious about how others fare and tackle similar tasks as they themselves are dealing with, and are used to learning through interaction with others, be it through role models or peers. Belonging to a group and feeling ownership of a process have also been shown to foster motivation for learning. Moreover, learning interventions and activities always have a limited time span, but contacts created between learners can last longer and thus support the learning process started during the interventions.

3.7.3   Recommendations

Learning theories and practitioners' experiences as well as evidence from our data indicate that learning events should emphasise the creation of a sense of community between the participants, encourage ownership of the process and plan for various forms of sharing and experimenting allowing the participants to experiment with the ideas and skills they are learning.

- Helping participants to get acquainted with each other at the beginning of learning interventions helps learners get involved in the learning activities quicker and more securely

- Encouraging participants to share and discuss experiences helps learners relate learning content to their own experience and find ways to incorporate the learning in a common future together

- The use of various "social media" tools can increase the feeling of belonging in online courses

- It seems vital to design learning activities in such a way that learners feel they have ownership in the process and content and believe they can influence the process

3.8 Sustainable new structures and practices

The project has challenged organisations and participants to develop new structures and practices which continue to exist and develop after the project has ended.

New structures and practices which help ensure sustainability are defined here as an important success factor, even though these aspects were not found in many of the projects. In the projects where these elements were found they contributed to the continued life and expansion of the project and its outcomes. When thoughts about project sustainability are part of the project planning, the risk that the initiatives of project will only last as long as it is financially supported is minimised. Projects with sustainable and innovative new structures and practises as integrated goals have a greater potential for establishing long lasting possibilities for training and education and thereby securing long-lasting change.

3.8.1   Examples from our data

The Noste Programme challenged educational organisers and institutions to create new types of operational models for adult education. New operational practices were developed to bring adults with a low level of basic education back into the educational process.

At the initiative of ETSC, LLLCs entered into agreements to run courses for ETSC's target group, and consequently agreed to adhere to certain quality guidelines in their work. These include the professionalism and professional development of their teachers. This increased awareness both among the centres' staff and in the ranks of board members and other supporters. Likewise, new activities such as guidance in the work-place and validation are in place in many institutions, and it would probably take many years of neglect to eliminate them:

> *Currently there are 12 employees working in 11 full-time equivalent units. Preparations for the certified courses and the first projects were chosen in cooperation with partners. The development of a database began with a dialogue with the Ministry of Education. The employees started preparations for validation of prior learning by gathering information and pilot projects. Pilot Projects on reaching the target group*

were also carried out, by sending counsellors to the workplaces in cooperation with various businesses. Finally a foundation for the promotion was laid with the formal opening of the organisation in November 2003. The publishing of Gátt, the professional journal, began in 2004 and since then a new issue has been published yearly and presented at the annual meeting each year.

Now, seven years later, the centre has published 27 certified syllabuses, outlines of various courses, studies for those contending with dyslexia, basic studies and vocational studies. Four syllabuses have been certified as pilot projects but are not yet published. Promotional materials have been published for several courses. Quality standards have been established and a quality assurance system has been developed in an international project. A total of 12 courses on andragogy have been developed and taught at the Life-Long Learning Centres around the country in order to enhance the quality of the education. (ETSC).

In Guidance and Counselling in the Workplace the study and career counsellors have had to learn new ways of working. This in turn has changed the way their training is organised at the University. Moreover, this project can continue as long as it is supported by the authorities. However, with increased turnover in Lifelong Learning Centres, some of them might choose to keep study and career counsellors on staff as a method for recruitment and as a necessary service for learners.

In Kollegial Vejledning the intent is to broaden the concept of the project to other groups of patients and staff. It is also intended to consolidate the concept in the participating ward after the end of the project period, although it is not yet known whether this will happen.

3.8.2   Why is this Success Factor important?

Sustainability is important if projects are going to have an effect after the project period is over. Many training projects come to an end when funding stops and their results may only be kept in dusty evaluation reports standing on the shelf. If projects are meant to accumulate knowledge and promote changes in an organisation, and thereby maintain contact with (new representatives of) the target group, it is necessary to incorporate ways of sustaining ideas, methods and further development as an integrated part of the project. Otherwise the project may have succeeded, but only over a limited period of time, and reached a limited group of people. The project might be of high value for those who have participated, but over the long term, it may not make much difference. Money is of course not wasted – but if the project continues in one form or another, the money spent on the project could be considered to be a long-lasting investment.

It can be argued that it is difficult to continue programmes when funding has ended and the teachers, counsellors and project managers have found new jobs or are involved in new projects. But as the above examples show, it is possible to aim at sustainability in other ways than by securing funding.

Creating new types of operational models, certifying syllabuses and establishing quality standards are all ways of implementing experience and knowledge generated in a specific project into everyday modes of working in an organisation. Training of counsellors is another way to generate permanent changes in the learning and training organisation. The intention of maintaining and spreading the ideas and experiences gained from the project in the educational organisation in this way can be built into the project from the very beginning.

3.8.3   Connection to relevant theories and research

What is argued in this chapter is that it is better to create permanent new structures rather than generating "once-in-a-lifetime" activities or activities solely based on the engagement of individuals. Often projects are driven by fiery souls who invest a lot of energy in running the project, but who also on a personal level are at risk of burning out. On the organisational level, there is the risk that when project managers leave a project, knowledge and experience which could be of value for the training institution are not shared and integrated in to the organisational structure. Sustainable new structures and practices can only be realized if the learning processes take place on an organisational level in the training institution or are maintained in permanent corporative networks and structures between project partners.

Success Factors

A theoretical perspective on organisational learning can be found in the theory of single and double-loop learning developed by Chris Argyris (Argyris, 2002; Smith 2001). According to Argyris, learning involves the detection and correction of error. When something goes wrong, it is suggested, an initial port of call for many people is to look for another strategy that will address and work within the governing variables. In other words, given or chosen goals, values, plans and rules are operationalised rather than questioned. According to Argyris (2002), this is *single-loop learning*. An alternative response is to question the governing variables themselves - to subject them to critical scrutiny. This is described as *double-loop learning*. Such learning may then lead to an alteration in the governing variables and, thus, a shift in the way in which strategies and consequences are framed. When the detection and correction of an error permits the organisation to carry on its present policies or achieve its present objectives, that error-and-correction process is *single-loop* learning. *Double-loop* learning occurs when error is detected and corrected in ways that involve the modification of an organisation's underlying norms, policies and objectives.

Single-loop learning is like a thermostat that learns when it is too hot or too cold and turns the heat on or off. The thermostat can perform this task because it can receive information (the temperature of the room) and take corrective action. A thermostat is double-loop learning if it questions why it is programmed to measure temperature and then adjusts the temperature itself.

The focus of much of Chris Argyris' intervention research has been to explore how organisations may increase their capacity for double-loop learning. He argues that double-loop learning is necessary if practitioners and organisations are to make informed decisions in rapidly changing and often uncertain contexts.

In relation to the question of sustainability of training projects, it can be argued that sustainable new structures and practices have a better chance of being established if double-loop learning takes place in the educational institution or in the networks between project partners. Double-loop learning implies reflection within the organisation as to why they act as they do and whether they can act differently. This practice of reflection is an important ability if the organisation has to deal with complex problems involved in motivating target groups which have no tradition for participating in learning activities, or maybe even more complex challenges such as finding ways to secure innovation and development in businesses and organisations under permanent pressure from international competition.

One of the problems with sustainability is that "practices" are mistaken for completed things, items or tools which can be stored and perhaps even moved from one context to another. We should remember that practices are usually contextual and evolving processes with an unlimited timeframe, and that they are most often solutions developed to "wicked problems" (Arnkil, 2010; Conklin, 2006).

The term 'wicked' is used not in the sense of evil, but as a crossword puzzle addict or mathematician would use it, as an issue highly resistant to resolution. The terminology was originally proposed by H. W. J. Rittel and M. M. Webber (1973). In a landmark article, the authors observed that there is a whole realm of social planning problems that cannot be successfully treated with traditional linear, analytical approaches. They called these issues wicked problems and contrasted them with 'tame' problems. Tame problems are not necessarily simple—they can be very complex technically —but the problem can be tightly defined and a solution fairly readily identified or worked through. In an Australian documental report (APSC (Australian Public Service Commission), 2007) wicked problems are defined in the following way:

- Wicked problems are difficult to clearly define.
- Wicked problems have many interdependencies and are often multi-causal.
- Attempts to address wicked problems often lead to unforeseen consequences.
- Wicked problems are often not stable.
- Wicked problems usually have no clear solution.
- Wicked problems are socially complex.
- Wicked problems hardly ever sit conveniently within the responsibility of any one organisation.
- Wicked problems involve changing behaviour.
- Some wicked problems are characterised by chronic policy failure.

Success Factors

To participate in the solving of wicked problems educational players have to aim for double-loop learning. It is not enough that certain, limited groups of adults get more formal education; often a questioning of the very way we think and act will be necessary.

3.8.4   Recommendations

Think about how the findings of and new practises developed in the project are going to survive after the end of the project period *before* the project reaches its end! The awareness of the sustainability of the ideas and practises of the project has to be integrated in every phase of the life of the project – from planning to evaluation.

4 Discussion

4.1 Project philosophy in deeper analysis: Learning for change or training for jobs?

So far the analysis has been based on the description of success factors. This kind of approach provides examples of "best practice" which seem to make training projects successful.

In order to give the readers an additional perspective on project world – and as a basis for discussion – we introduce another way to look at the projects. This is a typology of change orientations. This typology is based on a philosophical distinction between different roles which adult education can have in society: is it seen as a *change-oriented* or *reactive* activity?

It is common to talk about change which characterises today's society and the life situations of adults living in it. Slow and predictable *developmental changes* have been displaced by rapid and even disruptive *structural changes*, which are more difficult to anticipate, happen quickly and usually have unpredictable consequences (Manninen, 1998.) Therefore, individuals face demands for continuous learning and become more dependent on educational systems and institutions for opportunities to learn new skills and competencies. Ulrich Beck (1992) discussed this kind of *institutionalised individualisation* in his book *Risk Society*. As a result of *individualisation*, individuals are thoroughly dependent on the labour market and thus, dependent on education and its counselling and tutoring systems as well. 'Lifelong Learning' has become a synonym for 'Lifelong Earning' and 'Lifelong Employability' (Longworth & Davies, 1996, 64).

Adult and continuing education can address changes taking place in society in three different ways:

1) A **reactive** activity (helping adults and organisations to adapt to the changes that have already taken place),
2) A **proactive** activity (helping adults and organisations to anticipate future trends and situations), or
3) An **innovative or change oriented** activity (helping adults and organisations to create knowledge and competencies which are a necessary condition for any change and/or development to take place). (Manninen, 1998.)

For example, a reactive training program would be organised when the problem or situation is encountered (e.g. new computers have arrived or a major employer has left the region); a proactive training would be organised in advance, before the computers arrive or the factory finally shuts down and problems arise. An innovative, change oriented training is aiming at the creation of changes. It will also go deeper into the very heart of the problems, helping people to eliminate the causes of problematic situations. This kind of learning has usually been referred to as 'double loop learning' or 'reflection in action' (Argyris & Schön, 1978; Schön 1983), expansive learning (Engeström, 1987, 1994) or transformative learning (Mezirow, 1990, 1996). (For a more detailed discussion see Manninen, 1998).

These activities can be reduced to two strategies depending on whether they aim at training people for existing or forthcoming jobs ('Training for jobs strategy'), or in creating more general qualifications and preconditions for change of current practices ('Learning for change strategy').

Traditionally the role of training has been seen as reactive or proactive. Training and learning are not generally considered to be change activities, or tools that can facilitate changes and development, even though this is a more natural role for education. This philosophy can be clearly seen in the policy rhetoric on how to combat mass unemployment. Common phrases in policy documents claim that education and training systems 'should be able to **react promptly** to changes in society and working life'. It is less common to see education as a catalyst to large scale societal and organisational changes.

The differences between reactive, proactive and innovative training strategies are described in Table 3.

Discussion

Table 3. The assumptions behind reactive, proactive and innovative labour market training strategies (Manninen, 1998)

REACTIVE	PROACTIVE	CHANGE ORIENTED
To train workers for narrow, task-related skills in already existing jobs.	To train workers for narrow task-related skills needed in forthcoming tasks. Based on anticipative planning and vision.	To help adults to acquire new basic and general skills, competencies etc. which will help them to be innovative, develop their skills and learn how to learn.

It is also possible to analyse aims and objectives of training using the general strategies defined above. An additional dimension can be added, which is based on the assumption that (labour market) training can:

(1) help job seekers (or regions, companies) to compete with others in the same situation

- for example by organising courses on career planning skills and on how to write a CV and job application; the actual work competencies remain the same, but adults who have received the training are in a better position in the competition for existing jobs. In a similar way, a support programme for one company or village may just lead into unhealthy competition and problems in the next company of village.

(2) develop new skills

- courses providing new professional skills and competencies, so that the competence level of the work force in the area becomes higher. In the long run this might even invite new business in the area.

(3) develop new jobs

- courses usually organised for larger communities (village, professional networks) or companies, where the aim is to generate and support new "business" and open up new opportunities for income in the region.

These categories and the three strategies produce a 3x3-table:

Table 4. Aims and objectives of labour market oriented training (Manninen, 1998)

TRAINING STRATEGY

	REACTIVE	PROACTIVE	CHANGE ORIENTED
COMPETITION	Job search skills career planning skills	New forms of employment and income	Encouragement of innovations, entrepreneurship
NEW SKILLS	Training filling the current skill gaps	Training anticipating future trends	Change agents 'Chaos pilots'
CREATION OF NEW JOBS	Development programmes to meet the current needs of the labour market	Development programmes anticipating future trends	Innovative development programmes

Based on this table, it is possible to have a deeper look at the Nordic projects according to their relation to change (reactive, proactive or change oriented) and whether they are simply promoting competition between individuals, areas and/or companies, developing new skills and competences, or even creating new jobs.

Discussion

In real life the differences between the projects are not so clear, and usually projects have elements from several strategies. For example, projects like Noste can be criticised for promoting competition between employees by encouraging some of them to get formal recognition of their (existing) competencies thereby giving them better opportunities for survival in the labour market. However, Noste also had elements for motivating participants to participate in study programmes to update and learn new skills. On the change axis, Noste can be claimed to be in the reactive end because lack of formal qualifications was an existing problem when the programme started. On the other hand, it can also be classified as proactive if the focus is on the anticipation of future problems caused by low educational level of the workforce (see also a more detailed analysis of ECTS later on).

Therefore, the following examples in the table are tentative, suggested positions for some projects in our data. The purpose of this additional analysis is simply to give "food for thought", especially for further planning of projects.

Some projects were very easy to place on the "map", because they had a clear change orientation: Prisma at the individual skills level and Vincent in the business sector.

Table 5. Mapping of some projects according to change orientation

	RELATION TO CHANGE		
	REACTIVE: TO ADAPT Helping individuals, regions or companies to adapt to changes	PROACTIVE: TO ANTICIPATE Anticipation of future changes	CHANGE ORIENTED: TO CHANGE Aiming to actively change the current situation
COMPETITION Helping individuals (or companies) to compete with each other for the existing jobs or markets	*Helping by providing means of survival and adaptation, without really generating any new vocational or general skills: validation of existing skills, career planning* • Suðurnes	*Same as previous, but organised in advance*	*Trying to change the "rules" of the labour market or business life so that different groups of job seekers could become employed: awareness creation, new business plans* • Toive
NEW SKILLS Training new skills and competencies	*Retraining of people in order to help them adapt to a new situation:* • Edu-Vuxen • New waves • Perlos •	*Retraining and continuing education, but organised beforehand: anticipatory activities preparing for change* • Stronger community CNC Teknik[2010] • ETSC • Noste	*Training new skills in order to create new innovative ideas and to promote business development: innovative training models* • Flow • Kunstgreb • Prisma • Design in metal • Apprenticeship
CREATION OF NEW JOBS Creating new jobs and development of economy	*Projects aimed at attracting new business and jobs to replace downsizing* • New Paths	*Same as previous, but organised in advance*	*Projects aimed at generating new business opportunities, economy, organisations and individual entrepreneurship and innovations: business development programmes* • Vincent • Kraft

Discussion

It is worth noting that the "competition" row is a strategy which does not focus on competence and skills development. However, in many cases some skills development is included as well, but the main focus is more or less on survival themes, such as how to compete with others in the labour market. For example, if validation projects (like Noste) only provide formal recognition of already existing skills instead of raising the skills level of the participants, this kind of activity is clearly in the competitive category. In a similar way, also career counselling becomes a competitive activity if it only helps people to navigate more effectively in current labour market. Of course, these kinds of activities can be a starting point for further education and participation in more focused skills development activities, but they don't provide any new skills as such.

It is quite difficult to place a project precisely. For example, ETSC was first defined as a reactive activity promoting competition, just like Noste. However, further analysis and additional information about the background of the projects made it clear that they are more proactive (or even change oriented) and more on the "new skills" row. The following description of the background of ETSC describes the idea:

> Around the year 2000 the Icelandic Confederation of labour became aware of the educational level of the workforce, the big proportion of low-qualified labour and the static situation with regard to educational level in Iceland in comparison to other countries. A decision was made that these matters should be of concern for the confederation. One of the arguments was that adults that had not benefitted from the state funded school system should get a second chance to raise their educational level with support from the state. There was full employment at the time and there were no signs of the crisis ahead; unemployment was around 2% (less than 2 thousand individuals). Immigration had begun and would increase in the years to come from around 5 thousand workers in the year 2000 and to around 20 thousand in the year 2008. At that time unemployment was less that 1%.Trade unions within the confederation had gradually increased education and training for their members and it was apparently important to have educational provisions for the members although it was often difficult to get attendance to courses because of too much workload.

In spite of the health of the economy and labour market, the educational level of the workforce was a matter of concern for representatives of the Confederations. The trend in Europe with more emphasis on education and training of the workforce to improve the competitive situation probably added to the concern.

It was anticipated that the workforce of Iceland might not be flexible enough to meet future challenges and changes. Crisis was not anticipated at the time. Trends in other countries showed that low-skilled jobs were decreasing while high-skilled jobs were increasing. The Icelandic Confederation of Labour took action and contacted The Confederation of Icelandic Employers to discuss the matter. They had the same concern. Together the two confederations decided to bring this matter up with the government while negotiating on the labour market in the year 2001. At the end of the year these partners had decided to work on issues of education and training together with special emphasis on the part of the workforce that had not finished upper secondary education and training. A decision was made to do this through a new organisation based on an agreement with the Ministry of Education. The transfer was made from the Ministry of Labour that had until then been responsible for labour market education and training. The ETSC was established a year later to execute various tasks such as developing educational provision for adults and finding ways to encourage the low-qualified workers to add to their education and training. Most of the projects were on the European agenda, the biggest one being to develop accreditation of non-formal and informal learning.

One of the ways to encourage workers to learn more was the accreditation of adult learning according to new rules that were developed by the ETSC and the Ministry of Education. Emphasis in the educational provision was on basic skills like learning to learn, co-operation, independence, reading and writing in mother tongue and foreign languages, math etc. In vocational courses equal importance was put on the needs of the sector at hand and the general competencies of the workers. This approach of accreditation of adult learning also includes an attempt to build a bridge between non-formal and formal education, since the credit points gained could be used to shorten study paths within the upper secondary school system.

It is obvious that the row "new skills" has the central role, because development of new competencies will also help individuals and companies to compete with each other and eventually create new jobs. In fact, it is difficult to imagine any "creation-of-new-jobs" project succeeding unless there is a skills development process included in the project. For example, both Vincent and Kraft included further education modules in their programmes.

5   Is there a Nordic dimension?

In this chapter we discuss whether the success factors we have identified in our analysis could include a specific Nordic dimension. We discuss some important characteristics of the Nordic welfare states and draw attention to values important for developing Nordic adult education.

In 2005 the Nordic Council of Ministers and House of Monday Morning, the leading think tank in Scandinavia, identified a number of key Nordic thoughts from leaders of the business, culture and research communities and asked them to assess the potential of the Nordic countries in the global economy. The interviews with these leaders resulted in a discussion document which we have chosen as our point of departure in this report in order to describe some common values and characteristics of the Nordic welfare states.

Unanimously, the main question posed by the work of our research group was:

"How can education and training help people and/or organisations to deal with changes and crises in society and working life so that the Nordic Model of a welfare state can be preserved and developed?"

We found it necessary to agree on a common ground for describing the not identical welfare states. The discussion document "Norden som global vinderregion" (Nordisk Råd, Nordisk Ministerråd and Huset Mandag Morgen) was published in 2005 but is still relevant for analysis of Nordic values and strengths. To update the information we have supplemented the thoughts presented here with information from a number of newer articles and reports. Finally, we draw on the discussions among the participants at our midterm seminar, whose comments on the draft report were interesting and valuable for the final version of the report.

5.1   Nordic values

The Nordic thought leaders interviewed for the discussion document point to four fundamental conditions and eight values that the Nordic countries have in common.

The four fundamental conditions are:

- we share a *social system,*
- Nordic languages (except Finnish) belong to the same group of languages, and therefore we understand to some degree other Nordic *languages,*
- we are at the same level of *self-realisation* in terms of lifestyle,
- we have used each other as the *primary frame of reference* for many years.

The shared Nordic values are seen as equality, trust, proximity to power, inclusion, flexibility, respect for nature, the protestant work ethic and aesthetics. These values are part of our social system and contribute to many fundamental institutional similarities between the countries, with the balance between the community and the individual being of central importance.

Nordic values are closely connected to our form of society. All the Nordic countries have high taxation, large public sectors and comprehensive welfare systems. Therefore, on the institutional level, the Nordic countries are rather similar. A central Nordic value is the balance between the idea of community and the common good on the one hand, and the idea of the unique individual and respect for the human being on the other hand. The Nordic population can be said to exist at the highest level in Maslow's pyramid of needs; at the level of self-realisation. The level of self-realisation implies the setting of objectives, experimentation, creative development and creativity. That we, as societies, find ourselves at the top of the pyramid implies a certain surplus which influences our values. It has supported the development of a number of values which we maintain today: sustainability, equality, creativity, human rights, and quality of life - all values which are maintained on the basis of fundamental needs being met and satisfied.

"Surplus values" contain fragility. This fragility will be tested if basic needs are no longer fulfilled, which is illustrated in the current debate about employment benefits, early retirement and pensions in several Nordic countries.

Is there a Nordic dimension?

"Surplus attitudes" can be found in at least two versions: a laissez-faire version where the focus is on the right to choose a life-style and benefits, and a more proactive version, which realises that surplus values have to be developed, substantiated and nurtured. (Nordisk Råd, Nordisk Ministerråd og Huset Mandag Morgen, 2005).

In „The Three Worlds of Welfare Capitalism (1990), Gøsta Esping-Andersen proposes a classification of ideal types of welfare state. The Nordic model includes 'those countries in which the principles of universalism and decommodification of social rights were extended also to the new middle classes'. They were called the 'social-democratic' regime types, in which 'rather than tolerate a dualism between state and market, between working class and middle class, the social democrats pursued a welfare state that would promote an equality of the highest standards, not an equality of minimal needs as pursued elsewhere' (Esping-Andersen, 1990: 26–9, quoted from Antikainen 2010) . The cornerstones of the Nordic model were:

- Citizens' equal social rights; universalism;
- Responsibility of public authority (state) for welfare of all citizens;
- Striving towards narrowing of differences in income and gender inequality;
- Striving towards full employment.

Even though Antikainen (2010) documents a change in attitudes and politics in the Nordic countries towards a competitive state, he still concludes that there is a possibility that a welfare state strategy and a competitive state strategy can coexist.

5.2 What´s so Nordic about the Success Factors?

Inclusion and Community can be seen as central values in Nordic communities. The Nordic countries have a long tradition of democracy and negotiation. For several generations the Nordic societies have developed welfare systems which all members of society now take for granted. We expect the social institutions to take special care of weaker individuals who have the right to enjoy the same status as every other citizen. It is deemed as essential to a society's health that it make room for all members of society.

Among the success factors discussed in this report, the networking success factor can be viewed in relation to the Nordic value of inclusion and community. Networks are related to the concept of social capital which originates in Bourdieu (1986). He saw economic, cultural and social capital as the building blocks of social class. Putnam (1995) later defined social capital as consisting of moral obligations and norms, social values (especially trust) and existing social networks. Social capital is (according to Putnam, 1995) based on social networks, trust, norms and cooperation, and is, therefore, not an individual characteristic but a social one belonging to groups of people. It is, therefore, possible to talk about "Nordic social capital" and speculate whether networking between different players and organisations is easier in Nordic countries. According to OECD statistics, the amount of interpersonal trust in fellow citizens is highest in Denmark, second highest in Norway, followed by Sweden and Finland (OECD, 2010, 163).

At the same time, the Nordic countries have historically had a system of negotiation which implies a strong merging of interests between employers and employees. The Nordic unions have managed to articulate the needs of the workforce, to secure the inclusion of almost everybody in the labour market and to negotiate a framework of consensus rather than confrontation. Thereby they have contributed towards securing a kind of legitimacy among the workers, and have made the labour market system generally flexible.

The traditional triangular cooperation between trade unions, employer organisations and the state have made large-scale educational programmes easier than building the cooperation from scratch – or from a basis of violent conflict. Organisations representing managers and workers have existed for more than a century and they have been well organised. The Nordic trade union movement has historically been unique in its ability to organise almost all workers in every specific area of the labour market. Administration in Nordic countries has traditionally been close to practice, marked by relatively open and flat hierarchies, which makes it easier to negotiate and develop ideas between partners with different interests. Against this background, one could wonder if it is possible to speak of a "Nordic culture of dialogue".

Is there a Nordic dimension?

The organisational structure is good, and this enables networking; however, cooperation between different fields is rather new and thus not easy, which is one of the reasons why we consider "*New roles for institutions*" to be a success factor. This includes attitudes, strong philosophical strongholds and roles.

The Nordic culture of strong dialogues between stakeholders supports in principle the use of *process evaluation*. Successful use of process evaluation depends on the working culture, which has to be flexible and open to discussion and changes. A flat organisation structure is common in Nordic countries and this might make it easier to change directions of a project rather quickly, which means that a continuous evaluation process is meaningful for leaders and participants in a project.

A flat organisational structure, a tradition for dialogue and comparatively open and informal organisational structures may make it easier to discuss, evaluate and develop strategies.

At our midterm conference in August 2011, the participants discussed the Nordic "organisational habitus" – a culture-specific way of looking upon failures and mistakes and learning by them instead of denying them – as a foundation for making process evaluation. A tradition for listening to one another both across sectorial boundaries and across hierarchical lines was also mentioned as important. The Nordic tradition, however, could be developed in relation to systemisation and formality; informal evaluations are carried out continuously but are not always documented as well as could be for others to learn from them. There is a conflict between the need for a context bound way of evaluating and more formalised, generalised evaluations.

A similar dilemma can be found in relation to the success factor *sustainable new structures and practises.* Nordic societies are comparatively stable, therefore, sustainability should be possible to achieve. The institutions are very well organised with a high level of written standards which guide working practices, but this can result in projects only living as long as they are economically supported. At the same time, it is important to sustain creativity and that the tradition for experiments and new-thinking in the field of education and training is strengthened. The anti-authoritarian ideology in the educational field supports this. But, as documented in a new study (Nordisk Ministerråd and Huset Mandag Morgen, 2011), there is still a need for a more goal-oriented strategy which strives to further develop creativity, innovation and entrepreneurship in Nordic school systems.

Focus on needs – the needs of the individual and societal needs are the be-all and end-all of all educational activities. Because the Nordic countries have a high level of education, people and organisations are more able to analyse and recognise their learning needs. There is evidence that greater participation leads to more experience and greater recognition of new learning needs (Manninen, 2004).

Nordic educational institutions are democratic and anti-hierarchical. The needs of the individuals are of concern to teachers and educational organisations, and the individual student has a degree of influence on how he or she can fulfil own needs for learning. As mentioned earlier, there is a high level of self-realisation in Nordic countries which means that learners expect to be listened to and taken seriously. Still, it is important not to forget, that large groups – especially of young people - exist who find it difficult to chose an education and stay in the educational system. These groups might need even more support than is offered today in order to find their way in the educational system. As was put forward at our midterm seminar, many people need career guidance in order to identify own learning needs, and this is especially important in times of change and crisis. It is a challenge to find and integrate the needs of participants, project managers, stakeholders and society. The objective of *involving new groups* must be seen in connection with a Nordic tradition for universalism and equality in income and employment. It is often said that in the Nordic countries the most important raw material is the population of those countries. This tradition of trying to include all members of society can be found in a number of the projects – it is, for example, mirrored in the slogan *"Society needs all hands "(Toive)*. The tradition for inclusion reveals itself in efforts to reach marginalised or weak groups in the projects – and in efforts to prevent commonly well-integrated groups from falling into unemployment.

The recognition that lower educated people are a resource in society which should be developed for the sake of society and from a humanistic perspective, can be understood in connection with the Nordic values of equality and equal learning opportunities. Compared to other European countries, the Nordic educational system builds on an anti-elitist approach to education and learning- education is regarded as a common good accessible to all citizens.

Is there a Nordic dimension?

A historical tradition of voluntary participation in learning activities in all sectors of society is characteristic of the Nordic countries, as exemplified by the folk high schools for farmers, apprenticeships for skilled workers, and evening classes for unskilled workers (Rubenson & Desjardins, 2009).

We also have a tradition of cooperation between organisations representing managers and workers, and both groups are well organised. Nordic trade unions deal not only with the narrow, immediate economic interests of their members, but also more widely with the welfare, security and status of the member group, which follows this tradition of cooperation.

The Nordic countries are economically wealthy and a large sector of the population has a high level of consumption. Moreover, the Nordic populations are in general satisfied with their lives. Basic needs are met and people live in safe societies, belong to a social community and experience a certain recognition and status – not the least through work. On the individual level this can be seen as an important prerequisite for participating in learning activities. Of course, the motivation for learning and development does not come automatically when ones basic needs are fulfilled and differences in standards of living still exist in our welfare societies. But for large groups in society the high level of well-being means that reserve of energy for engaging in learning activities, either with career or self-realisation as a goal, is high.

Rubenson & Desjardins (2009) analyse Nordic countries in their interesting article "The impact of Welfare State Regimes on Barriers to Participation". They suggest that a *"particular welfare state regime can be found not only to be implicated in social structures, adult education systems, and life chances but also in individual conscious-ness [….]From the perspective of individual consciousness, we draw on Bourdieu (1990), who points to the inter-action between an individual's habitus and field, or social context. Simply stated, the latter structures and condi-tions the habitus, which can be seen as a system of dispositions that governs how a person acts, thinks, and ori-ents him or herself in the social world […]. Thus, we see individual dispositions as both directly and indirectly af-fected by the welfare state regime. The system of dispositions is a result of social experiences, collective memo-ries, and ways of thinking that have been engraved in peoples' minds"* (Rubenson & Desjardins. 2009, 196).

They conclude that that "the major differences between Nordic and non-Nordic countries are not the existence of barriers to participation but the conditions that allow a person to overcome these" (Ibid.: 203.). Thus, the article brings into question the usefulness of trying to understand barriers by focusing solely on how individuals interpret the world and instead suggests that we also include structural factors and analyse the interaction be-tween these and individuals' dispositions. Our theoretical perspective is that welfare state regimes can affect a person's capability to participate through the way it constructs structural conditions and helps individuals over-come both structurally and individually based barriers.

The comparatively high and equal participation in adult education in Nordic countries has prompted inquiries as to why this might be the case. Although there is a distinctive and persistent pattern of non-participation which is similar to a range of non-Nordic countries, the success of Nordic countries appears to lie precisely in their ability to overcome a variety of barriers to participation. The Nordic countries have a long-shared history of supporting and fostering a rich adult learning culture. Similarly, we have a long history of distance education and quite good infrastructure for ICT.

Flexibility and flexible access to learning possibilities are characteristic of the Nordic countries. As the partici-pants in the midterm seminar suggested, the Nordic Welfare model makes it possible for citizens to promote personal development and career building through adult education - sometimes at the same time. The flexible access to education means than one has the chance to follow his or her own learning process in a fluid way re-garding time and space.

Nordic countries also share a strong record of public policy that aims to promote adult learning, foster favourable structural conditions, target various barriers to participation, and ensure that disadvantaged groups have equal opportunities for adult learning. Our observations indicate that the type of welfare state regime matters in fos-tering participation, especially among adults who would otherwise not participate.

The tradition of high and equal participation is perhaps what is reflected in the use of *community as pedagogical strategy.* The disposition among teachers and educational planners is often to create a democratic and emotion-ally safe environment – partly built on professional knowledge, partly built on the described Nordic habitus.

Is there a Nordic dimension?

5.3   Recommendations – how to make an educational project successful?

The recommendations based on this analysis can be summarised in the following list:

1. Create a network to work with - preferably with partners who bring different assets to the group. Unexpected partners can bring unexpected benefits.

2. Make sure you have enough flexibility included in the studies in terms of contents, study methods, access and means.

3. Use Process Evaluation or other systematic evaluation methods through the whole process.

4. Assess the target groups' learning and development needs and design the project to meet these needs.

5. Be bold - design projects in such a way that your organisation and partners need to do their jobs in other ways than they are used to. Try new methods and models. Use pilot projects to create new practices and ways of addressing old problems.

6. Aim consciously at including groups who have traditionally been non-participants in learning activities or are new target groups for your organisation.

7. During project design, plan the learning interactions in such a way that participants gain a sense of ownership, active participation and community through the learning activities.

8. Consider the survival of the ideas and practises of the project through all phases, from development phase to evaluation.

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7   Appendix 1.

Project description form

NVL Competence project & case description form

Name of the project/case/training programme:
Organisation in charge
Partners   •
The Idea: (Where did it come from / How did it all start)
Description of the problem or challenge the case is trying to solve (eg. unemployment, lack of skills, societal problems…)
Target group:
Objectives:
Cooperation: (type, diversity, character, quality, innovation)
Scope (how big, how many people were potentially touched by the project, budget and type of funding)
Description of activities / structures / procedures (what was done and how)**:**
Methods
Pedagogical approach (Detailed description of what kind of learning theories and pedagogical models are used):
Obstacles to overcome
Outcomes
Measurement (How was success measured?
Success factors (What made the project successful)   **Understanding of local situation**
Interesting / surprising
Links to additional information and references (website, publications etc.):
Contact person (name, email, telephone):