

# **Fife and Tayside Wider Access Forum Interim Evaluation Report**

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**Bellevue Consultancy  
Brodies LLP  
Critical Thinking**



Ann Hughes  
Director

**Bellevue Consultancy**

24 Bellevue Crescent  
Edinburgh  
EH3 6NF

tel. 0131 556 0727  
fax. 0131 556 0727  
e-mail. [ann.hughes@bellevueconsultancy.co.uk](mailto:ann.hughes@bellevueconsultancy.co.uk)

Derek Stewart  
Director – Management Consultancy

**Brodies LLP**

2 Blythswood Square  
Glasgow  
G2 4AD

tel. 0141 248 4672  
fax. 0141 221 9270  
e-mail. [derek.stewart@brodies.co.uk](mailto:derek.stewart@brodies.co.uk)

[www.brodies.co.uk](http://www.brodies.co.uk)

Jane W Denholm  
Director

**Critical Thinking**

18 Frederick Street  
Edinburgh  
EH2 2HB

tel: 0131 220 4520  
fax: 0131 226 1306  
e-mail: [j.denholm@criticalthinking.co.uk](mailto:j.denholm@criticalthinking.co.uk)

[www.criticalthinking.co.uk](http://www.criticalthinking.co.uk)

## **Fife and Tayside Wider Access Forum Interim Evaluation Report**

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# Fife and Tayside Wider Access Forum Interim Evaluation Report

## 1. Introduction

### The Fife and Tayside Wider Access Forum

The Fife and Tayside Wider Access Forum (FATWAF), a partnership of three universities, five<sup>1</sup> local colleges and the Open University in Scotland, has been in existence in its present form since 2003. For the three preceding years, the Forum operated as a partnership of the three universities and the Open University in Scotland. It is one of four regional wider access forums funded by the Scottish Funding Council (SFC) with the objective of promoting wider participation in higher education to traditionally under-represented groups.

The Forum partners are committed to working with each other and also more broadly with local councils, community groups - including those in the voluntary sector - Careers Scotland and others, towards meeting a strategic aim which they have identified as *improving participation rates in HE and FE level programmes and other education and training among target groups<sup>2</sup>, thereby contributing to the Scottish Executive's aim of widening participation in HE level programmes.*

The Forum has been developing a new strategic and operational structure. As part of this, it was agreed in December 2006 that the Forum's work should be overseen by a Senior Management Strategy Group with membership from all organisations in the region that have an interest in widening participation. This Group will advise on the Forum's strategy and elect the Forum's Executive Group which is responsible for implementing that strategy. From January 2007, the Executive Group comprises two members from each of the college and university sectors and the Chairs of the Forum's two thematic programmes, LIFT OFF for schools, and Transitions for post-compulsory education. Each of these programmes has its own Management Group which is responsible for a suite of projects through which the theme is progressed. The Theme Management Groups report to the Executive Group which, in turn, reports to the Senior Management Strategy Group.

From the point of view of day to day management and administration, the Forum has a Manager (who attends both Executive and Senior Management Strategy Group meetings); an Administrator; and two small support teams – one for each theme – each led by a Development Officer. The Forum is hosted by the University of Abertay in Dundee where the Manager and Administrator are based. Other staff are based in various locations throughout the region.

## Evaluation

In June 2005, the Forum Executive appointed Critical Thinking and Bishops Consulting, (now part of Brodies LLP), to supply an evaluation service for the Forum until 2008. The service is to provide an ongoing critical and formative review of the

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<sup>1</sup> Following the merger of Fife and Glenrothes Colleges in August 2005 to form Adam Smith College

<sup>2</sup> Target school pupils, target pupil groups, and adult learners

Forum's performance and progress and overall effectiveness in meeting its strategic aim up to that date.

In the course of our engagement with the Forum, we will provide three reports in total: initial, interim and final. We provided the initial report in December 2005. That report established the policy context in which the Forum was operating at that time, mapped the Forum's strategy for the period 2004 to 2008, and established a balanced scorecard of measures against which the Forum's progress and performance could be gauged. The report also provided a set of baseline statistics relating to student enrolment, progression and attainment. It covered the period September 2004 to December 2005, so spanning two academic years: all of 2004/05 and a third of 2005/06.

This is the interim report, again spanning two academic years: all of 2005/06 and almost half of 2006/07. In it, we revisit the policy context and review the Forum's progress and performance during the period, although we should note that the project reviews we considered covered 2005/06 only. Our final report, in March 2008, will provide a corresponding review for the 2006/07 academic year and for 2007/08 to the date of report. It will also provide an assessment of the Forum's progress and performance and overall effectiveness across the full period of the evaluation, and comment on particular strengths and areas for further development. As the Forum's work proceeds, beyond the period of our engagement as evaluators, the final report will provide a basis upon which the Forum can continue to evaluate its effectiveness itself.

## **Background**

There are two main elements in our approach to the evaluation overall: monitoring the policy context in which the Forum is operating, and applying our agreed evaluation framework, this latter including evaluation of progress against a set of key baseline statistics relating to student enrolment, progression and attainment.

Our review of the policy context in late 2005, together with a suite of key baseline statistics (substantially relating to 2003/04), were set out in our initial report. This report formed part of the Forum's 2004/05 Annual Report.

The evaluation framework is set out in detail at Annex A. Briefly, it comprises a Forum specific strategy map, derived from the Forum's strategic plan, to chart what the Forum needs to do to deliver its overall objective, and a 'balanced scorecard' of performance measures to gauge the Forum's effectiveness. Both map and scorecard measures were developed in collaboration with Forum members through an intensive series of meetings and correspondence in the period September to November 2005. The measures are grouped according to the four types that will be considered for purposes of the evaluation: internal management; partnership effectiveness; learning and capacity building; and impact and customer service.

Following agreement on the measures at the end of 2005, we met with the Forum Manager on five occasions in the succeeding twelve months to agree the means by which data to support the measures were to be collected and the timescale for their provision. In this context, we also worked to develop an instrument for surveying and analysing pupil responses to the residential summer school offered within the LIFT OFF Theme in August 2006. We understand that due to some operational difficulties, this was not used in 2006 but the Forum is planning to review it for use in 2007.

## 2. Interim evaluation

For purposes of this interim evaluation, we have revisited the policy context to identify significant developments, and we have surveyed stakeholder perceptions of progress and performance. In this latter connection, we ran a Focus Group on 14 November 2006 and, in February and March 2007, conducted eight interviews with a sample of individuals drawn from a range of stakeholder organisations. We have also reviewed documentation supplied by the Forum Manager. This has included reports to Forum meetings held in 2006 (two of which we attended, along with the Forum's 2006 Annual Conference); commentaries on the projects under each of the Forum themes – LIFT OFF and Transitions – referenced to supporting documentation; and an assessment of progress and performance across both themes in relation to the enablers identified on the Forum strategy map. The commentaries and assessment were supplied to us in early January 2007 and were in respect of the 2005/06 academic year.

We understand that a great deal of 2005/06 was occupied in putting in place the structures – and, equally importantly, the staff – to realise the strategy. At this early stage of implementation, therefore, evidence of progress and performance is inevitably going to be more readily discernable in the lower reaches of the strategy map – in the enablers and, to a lesser extent, the activities. Over time, with consolidation at these levels, evidence should become more apparent in the mid and upper reaches of the map, in strategy, outcomes and impact. This situation needs to be borne in mind in the discussion of progress and performance under the typology of the scorecard performance measures that follows the review of policy context in the text below.

### Policy context

In our review of the policy context in our initial report in December 2005, we noted a firm line of commitment on the part of Government to widening participation in learning in general, and in particular for traditionally under-represented groups. Partnership between key and interested parties – public, private, voluntary and community – emerged as a common feature of delivery of objectives, and collaboration at regional level as a key focus of effort for improvement. Developments since have served to reinforce this position.

In June 2006, alongside *Workforce Plus*, its broader Employability Framework for Scotland, the Scottish Executive published *More Choices, More Chances*, its strategy to reduce the proportion of young people not in education, training or employment, or NEET. The strategy has a dual focus – on the 16-19 age group and on those pre-16s likely, without appropriate support, to become NEET. It also has an initial emphasis on seven target areas where NEET presents a particular challenge. Dundee, in the Fife and Tayside Forum area, is one of these areas. Local authorities are expected to lead on implementation of the Executive's NEET strategy, working with local partners.

*More Choices, More Chances* also indicates that the Scottish Executive will support the Scottish Funding Council in implementing the action plan for *Learning for All*, the Council's root and branch review of widening participation. Indeed, the Executive goes so far as to cite *Learning for All* as a key part of its lifelong learning strategy. *Learning for All*, issued by the Funding Council in the autumn of 2005 as we were preparing our initial report, has, then, been very positively received.

Implementation of the *Learning for All* action plan is well under way. This is hugely positive for the Wider Access Forums, and means, in particular: revision of their remit to make clear that their sphere of interest spans all post-compulsory education; greater stability, with funding from 2008 to be awarded on a two year rolling basis against business plans; a closer working relationship between the Council and Forum Managers, with the use of central resources, including research data and budgetary management, being maximised; and provision of a good practice guide to support the operation of the Forums at a local level. Also worth noting is the decision to strengthen the membership and remit of the existing national advisory group on widening participation and place it under the chairmanship of the Council's Director of Learning Policy and Strategy.

As part of the action plan, in February 2007, the Council published the first of a series of annual reports presenting, at national and regional levels, the quantitative data that it intends to use to assess its own progress – and that of others – in widening participation. These data present a source of information to Forums that is valuable as it stands. However, it also has the capacity, through further drilling down, to yield more specific information at the local level that is likely to be of use and interest to Forums.

Finally, the Council has published its Corporate Plan for the period 2006 to 2009. This has fair access as its first aim and, within this aim, the removal of barriers to enrolment and progression as one of three key objectives. The principal strategies to the achievement of the objectives include pursuing the recommendations in *Learning for All* and working closely with partner bodies such as Careers Scotland and Learndirect.

All in all, the policy environment confirms the centrality of the Wider Access Forums to the widening participation agenda and a continuing high level of expectation upon them. From the point of view of the Fife and Tayside Forum, it is in sympathy with the partnership approach to activity which is at the core of the Forum's strategy of enhancing and filling gaps in provision and, in particular, it fully bears out the efforts the Forum is making with schools.

## **Progress and performance**

As indicated above, this is still an early stage in the implementation of the Forum's strategy. Performance and progress will inevitably be more readily discernable at the strategy map's lower reaches, at the enabler and, to a lesser extent, activity levels, than at its mid and higher reaches of strategy, outcomes and impact. This needs to be borne in mind in reading the commentary under the balance scorecard's typology of measures that follows.

The typology and detailed measures are at Annex A to this report. Briefly, the typology comprises:

- Internal management
- Partnership effectiveness
- Learning and capacity building
- Impact and customer service measures

We consider each in turn below.

## Group 1: Internal management

This set of measures is critical to managing activities and processes. Measures here fall into three categories, all concerned with how the Forum organises and manages itself to deliver its outcomes: enabler development and implementation (subsuming resource management, comprising finance, people, and information and communication technology); activity development and implementation; and strategy.

Relevant boxes on strategy map		
	Box ref. no.	
Strategy	10	All strategic aims
Activities	11	Raising awareness of learning opportunities
Activities	12	Identify and promote pre-access activities
Activities	13	Provide a continuum of activities in primary and secondary schools
Activities	14	Review and promote part-time work-based learning routes
Activities	15	Develop a 'transitions' project eg a residential experience
Activities	16	Raise mutual understanding of teachers and college and university staff
Activities	17	Build college and university partnerships in access programmes
Activities	18	Improve HN to degree programme articulation
Activities	19	Develop support for potential HE level students "at risk"
Enablers	20	Deploy budgets effectively
Enablers	21	Use people effectively
Enablers	22	Harness technology appropriately
Enablers	25	Develop the Forum website
Enablers	26	Mainstream projects over time as appropriate
Enablers	27	Develop and share information
Enablers	30	Identify datasets and develop and set targets
Enablers	31	Develop appropriate documentation
Enablers	32	Develop a branded common approach

### Enabler development and implementation

As we have indicated earlier, we would expect progress with the enabler-level activities on the strategy map to be more advanced than that with activities at the other levels.

### **Budgets (20)**

Financial management and resource allocation processes are generally agreed by stakeholders to be transparent. The consensus appears to be that there are established and widely-understood procedures for planning, allocating funding and reporting.

Partly because of the way that budgets have been allocated by the SFC – funding for one year to be managed within year – and partly because of the Forum's difficulty with costing projects in advance, issues about managing over- and under-spend have occupied a disproportionate amount of the Executive Group's time to date. However, opinion is that, for several reasons, this situation is set to improve. First, the Forum has gained experience in costing from the first cycle of projects; second, the Funding Council is to fund forums on a two year rolling basis with effect from September 2008; and third, the Forum is moving from project based funding to funding on the basis of programmes of activity within its two overarching themes, LIFT OFF and Transitions. The organisation of the Forum's work on this basis has itself been widely welcomed as a positive step, providing a coherent structure within which the wide range of projects can operate and be understood.

Stakeholders consider the Forum to be a useful means whereby they can obtain additional funding for both 'new and extra' activities - some of them experimental - that mainstream budgets would not afford. Interviewees also mentioned that pressure

on budgets - in local authorities in particular - is such that Forum funding may be the only source of continuity available for these activities.

### ***People (21)***

Stakeholders universally report a high degree of confidence in the Forum secretariat, and in the Forum Manager especially, upon whom it is clear that a great deal depends operationally (see also Partnership Perceptions below). The Executive Group is satisfied that the Forum secretariat is highly committed and is making a difference. It is worth commenting at this point on the consequences of the recent change in the Forum's management arrangements. The decision to include the Chairs of the Management Groups of the Forum's two Themes – LIFT OFF and Transitions – on the Forum's Executive Group is seen firstly as having worked to facilitate more fully informed discussion and debate at meetings, and secondly to alleviate a little of the pressure on the Forum Manager by spreading the responsibility for understanding the detail of projects.

We note below (in Group 2, Partnership Effectiveness) the perception that, overall, the level of participation and involvement of stakeholders is good. At the same time, however, we have been made aware of a particular concern about the degree to which senior staff are engaged in the Forum's activities. Indeed, concern is such that engaging more effectively with staff at this level has been identified by the Forum Manager as a priority for this year. From what we understand from interview, however, we observe that it may be unrealistic to expect engagement at very senior levels in local authorities. We were told that substantial delegation of managerial responsibility is the norm in local authorities. Indeed, the absence of senior officers could be interpreted positively as a sign that things are progressing satisfactorily.

We are aware of some concerns about the dispersed nature of the Forum secretariat and the differing terms and conditions under which they are employed. To a large extent, these are issues faced by all the forums and they are a function of partnership working. There is no ready way forward on terms and conditions – the complexities involved in transfer of staff from one set of terms to another are well known. We understand, however, that the Forum is seeking to address and resolve issues in this area as existing contracts, which are all short-term, come to an end. As far as the Forum's distributed style of operation is concerned, we note the positive view that influenced its adoption initially, viz., it affords a higher degree of visibility in the region than would otherwise be the case, and also of accessibility, including a range of perspectives and feedback on Forum activities.

### ***Technology (22, 25)***

The Forum website has been commissioned but has still to go live. Its design has been the subject of wide consultation, and it will operate on a zonal basis so as to cater for the needs and interests of the Forum's diverse audience – students, teachers, college and university staff etc. It is seen as being as valuable for purposes of internal communication – including disseminating materials – as for external.

There is awareness that there is potential for exploitation of other types of technology. Specifically mentioned was mobile phone technology for texting.

### ***Mainstreaming (26)***

As indicated at 'Budgets' above, stakeholders view Forum funding as a route to supporting additional and often innovative activities. We noted the view that pressure on individual stakeholder budgets, particularly those in local authorities, appears to be such that Forum funding may be the only source of continuity for such activity. From this point of view, widespread mainstreaming seems to be an unlikely eventuality.

**Documentation, data and information (27, 30, 31)**

Forum documentation is generally considered to be helpful by those involved in delivering projects, and, as recorded below, there is a high degree of satisfaction with the quality of the information made available to those involved in project review.

Determining the Forum's outcomes and impact will crucially depend on the availability of data at each of two levels: project level and, for contextual purposes, national/regional/area level.

At project level, the Forum's two Theme Management Groups – LIFT OFF and Transitions - and the Executive Group, receive reports that are amalgamated from the quarterly reports that projects submit to the Forum secretariat. These reports are intended to include data based on targets set for each project at its inception, and will be developed over the coming year so that they can better inform ongoing discussion of the progress of each. The Executive Group appears to be satisfied that it is provided with sufficient information to allow it rigorously to consider and discuss each project individually. As emphasised earlier in this report, it is early days to expect a great deal of measurable progress yet. However, the means which will enable progress to be measured should be firmly established by now. Interviews and sight of reports - and of a sample project monitoring proforma - suggest to us that there is considerable work to be done to develop skills in setting targets that are meaningful and measurable, and on reporting on them constructively.

Above project level, robust quantitative data in an extended time series must be available in order properly to understand the context in which the Forum is operating. With this in mind, and with a view also to the needs of our evaluation work, we developed and provided a set of baseline data in our initial report in December 2005. The data were extrapolated from national statistics for the region and its four areas, and were substantially in respect of 2003/04. It was intended that the Forum would maintain, update and use these data both to help determine its strategy and to assess its progress and achievement.

However, we understand that, to avoid possible duplication of effort, comprehensive updating of the baseline data was put on hold pending publication by SFC of data for purposes of measuring progress with the implementation of the *Learning for All* action plan. The SFC data, some at national and others at regional and forum level, were published in February 2007 and are to be updated annually. Whilst these are - and will be - helpful, and there are indications that they might be further developed in response to Forum requests, the information currently available does not provide a comprehensive picture at the level of detail required by the Forum.

While waiting for publication of the SFC data, the Forum has been making use of the older baseline data, updated as far as possible with data from other sources - including those collected by the individual local councils and institutions. Members of the Executive Group themselves also have a good knowledge of contextual data which are relevant to their core activities. Whilst we appreciate the circumstances that have conspired to create this situation, we think that a more systematic approach to data collection now needs to be taken.

Looking towards assessing the Forum's impact in the medium to long term, we think that it needs urgently to address key data issues at both project and overall contextual level. As well as considering individual projects, the Executive Group needs to be better able to see how these might be adding together to serve the Forum's overall aims and objectives. Projects need to be considered both in the context of the theme they support and in the context of the Forum's overall programme. From this point of view in particular, referencing of project data to more

general data about the region would be helpful. We acknowledge that addressing data issues is considered to be a priority by the Forum secretariat.

### ***Common branded approach (32)***

During 2005/06, the Forum adopted a logo and made a conscious effort to brand its activities. We note the FATWAF brand is perceived as useful internally as an 'official stamp'. However, the brand is not believed to be widely known to the Forum's target groups. This, though, is not considered to be significant. The view is that, ultimately, it is the activities that are important rather than the brand.

## **Conclusions**

- Most of the enablers have been addressed although some (eg the website and technology) require a little more work, and others (eg documentation) will require constant attention to ensure they remain current.
- Some key enablers – specifically datasets and targets - are not yet properly in place and need immediate attention. While it is too early in the lifetime of the Forum's strategy and projects to expect to see much, if any, evidence of progress, especially in quantitative terms, it is imperative that the capacity to consider such evidence exists and is maintained.
- There should be investment further to develop skills in target setting at project level.
- The Forum should begin to exploit its organisational structure more fully for purposes of reviewing, reporting and reflecting on activity. Thus, Theme Management Groups should consider and report on their projects individually and collectively in the context of their Theme, and the Executive Group consider Theme reports in the context of the Forum's overall aims and objectives. In this way, the Group will be in a more secure position to take a strategic view.
- There is a high degree of confidence in the Forum secretariat, and in the Forum Manager especially. However, the pressure and dependence on the Forum Manager is acknowledged. Consideration might usefully be given to the opportunities offered by the new organisational structure for further alleviating pressures on the Manager and, coincidentally, moving to a more sustainable model of operation managerially.
- There is a need to be realistic about the extent to which mainstreaming projects is likely to be feasible, given pressure on partner budgets.
- There may be a similar need to be realistic about the degree to which the engagement of senior staff in partner organisations is necessary or achievable.

## **Activity development and implementation (11, 12, 13, 14, 15, 16, 17, 18, 19)**

As we have indicated earlier, next to enablers, activities is the other area of the strategy map where we would expect to begin to see some progress by now. At this stage, and given our earlier comments about the need to update regional baseline data and adopt more systematic target-setting at project level, our evaluation tends towards the impressionistic. There has undoubtedly been positive movement in the activities section of the strategy map – an extensive programme of activities is in place - but, from the rather low evidence base that currently exists, it is not possible to be clear about the nature and extent of progress that has been made. We expect more of an evidence base/audit trail to develop over time and as monitoring arrangements are refined. We will revisit the impact and sustainability of the programme of activities in our next, and final, evaluation report.

Activities in 2005/06, as represented by the projects operating under the Forum's two Themes – LIFT OFF and Transitions – are set out in Table 1 overleaf. The table shows an array of activity involving a wide range of partners. Of the projects that are ongoing, not all are yet in steady state, and we could not ascertain a consensus among practitioners about the extent of relative progress with the themes.

We note a view that activities are furthest advanced with colleges and universities, where there are considered to be well-developed partnerships of long standing. Schools and community activity is considered to be progressing, however, and schools especially so since staff moved into post part way through 2005/06. There is agreement that not much has happened to date as far as work-based learning is concerned. From our work on developing the Strategy Map, though, we recall that this area was not generally considered to be a high priority for development.

Overall, partners appear to be content with the mix of projects. Some projects were described as 'excellent' and 'especially impressive' by stakeholders we interviewed.

Reports on projects give confidence that there is learning from initial experience – e.g. with operating the Pre-Access (Transitions theme) project – that will strengthen engagement with the activities on offer where there is a need to do so. It is also apparent that a range of steps is being taken to consult on delivery and content of programmes, including written post-activity evaluations, provision of forums and dedicated staff meetings. At the same time, there is general acknowledgement that more could and should be done, particularly by way of engaging with students and pupils. In the latter context, the establishment of a pupil forum is considered to be a very positive step. It is also believed that the Forum website will help once it goes live; and, particularly in so far as young people are concerned, harnessing mobile phone technology for texting.

On the basis of the admittedly limited information available at this stage, we understand the perceptions of at least some target groups to be positive. We understand that feedback from pupils (and teachers) on the schools based projects *Am I bovered* and *Surviving Standard Grade* has been good, and similarly on the residential LIFT OFF to Success residential summer school programme. Interviews suggest there has been an encouragingly high level of willingness on the part of school staff to engage with subsequent post-activity review and development.

We expect to be in a better position to report on general progress next year as activities are further developed and the information base on success/performance becomes wider and richer. At that time, we will seek to determine the extent to which both levels of participation and enthusiasm have been maintained (or further developed), and that a positive and related impact on the desired outcomes has been delivered.

<b>Table 1: FIFE AND TAYSIDE WIDER ACCESS FORUM ACTIVITIES BY THEME 2005/06</b>			
<b>LIFT OFF (13 projects)</b>		<b>Transitions (8 projects)</b>	
<b>Activity</b>	<b>Focus</b>	<b>Activity</b>	<b>Focus</b>
LIFT OFF to Success	S4 Residential Summer School for 13 target secondary schools across the four F&T LA areas. Includes pre- and post-School activities.	Pre-Access Communities Project	Non-traditional learners into FE and HE
Student tutoring	Aiding pupil transition to college and university through student-pupil matching (Dundee and St Andrews universities)	SWAP East	Adult learner transitions to FE and HE (multi-strand project)
Fife Young Mothers	Transition to FE and HE (Fife Council initiative)	Guidance Plus	Non-advanced to HN courses (best practice model)
Travellers' children	Awareness raising through college taster days	College student peer mentoring	College students vulnerable at transitions stage
Careers in Creative Industries	S2 pupil awareness raising (Dundee City Council initiative). This project has been cancelled and funding transferred to the information Literacy project	Diversity – OU cross-forum project	Black and ethnic groups, refugees, asylum seekers (info pack; website; staff development)
Information Literacy	FE and HE preparatory IT skills for school pupils (Dundee and Abertay universities with school staff)	Progression routes in Fife	Web based map related to growth occupational areas
College student ambassadors	Training for college students to act as ambassadors in schools – model developed by Dundee College)	FE/HE research	Transitions from HN to degree to determine effective pre-entry activity, amount and timing
Stepping Higher	Articulation routes between college and university (booklet)	Scoping for FE/HE research transition activities	Establishing best practice in managing FE to HE transition
Your Future, Your Choice	Routes to FE and HE (leaflets)		
Surviving Standard Grade – Parents' Guide	Live drama, DVD and delivery notes for all schools in F & T		
Am I bovvered?	Drama and teachers' pack dealing with barriers to access and achievement. Piloted in Arbroath Academy		
Choosing Science	STEM Group research into identifying drivers affecting choice		

We are also aware of two further projects in the Transitions theme that came on stream in the early part of the 2006/07 academic year and therefore within the period of this report: the Scottish Credit and Qualification Framework/Personal Development Plan project testing both in a variety of community learning settings; and the Care Leavers project, developing a practitioner network to support young people leaving care into further and higher education.

## **Conclusions:**

- An extensive programme of activities is in place, involving a wide range of partners.
- We did not envisage significant impact on desired outcomes at this stage. The structure behind our strategy mapping approach aims to map the logical links between enablers, activities and subsequent impact. Our largely positive findings about progress with enablers and activities therefore provides some confidence that the desired impact will be achieved as FATWAF's programme of work is progressed. This confidence is reaffirmed by the initial observations made regarding participation in, and enthusiasm for, individual programmes and projects.
- At this time, a full and robust information base has yet to be developed that allows meaningful comment on outcomes and impact. We envisage that progress will be made in this area over the next year, and will aim to draw associated conclusions in our final evaluation report.
- Looking ahead, overviews of progress and effectiveness on a theme basis linked to theme strategy would be helpful to the Forum, as would a corresponding overview of both themes linked to Forum strategy.

## **Strategy (10)**

The Strategy provides the framework within which FATWAF's activities are planned, supported and implemented. With this in mind, we have not set out a distinct set of findings about Strategy implementation. Rather, the evaluation of progress is informed by the progress described under the enablers and activities sections of this report.

**Group 2: Partnership effectiveness**

This set of measures is critical to building and capitalising on relationships between key partners. Measures here fall into two categories: partnership progress; and partnership perception. Progress measures seek to assess the extent to which partnership is real and embedded (through tangible action that has been taken to build and maintain joint working); perception measures to assess how partners view achievement in the range of delivery and management activity with which the Forum is engaged.

While the two *should* be highly interlinked, experience of other projects indicates that there can be a lag between the action being undertaken and the development of a shared perception of genuine progress in partnership working. Indeed, in some instances, the action fails to lead to any significant change in perceptions (either due to the scale or pace of action failing to meet expectations, or because disagreements about the nature of the action taken lead to further divisions).

Relevant box on Strategy Map		
	Box ref. no.	
Enablers	33	Effective partnership working

**Partnership progress**

Throughout our involvement, many stakeholders have made the point that they perceive Fife and Tayside to be the least coherent of the four Forum regions socially, economically and geographically. In consequence, partners and Forum staff have had to work hard to establish it as an effective entity at both strategic and practitioner levels.

By its nature as a partnership, FATWAF involves a wide range of bodies and organisations, among them local authorities; schools; colleges; universities; community groups; and agencies such as Careers Scotland. To the extent that they tutor, teach, provide advice and guidance etc, almost all of the staff in these partner bodies will be practitioners. A few may operate exclusively at the strategic level of ends and means, and more will operate at both levels, practice and strategy. Those involved in the Forum’s management - on its Senior Management Strategy, Executive and Theme Management Groups - will more than likely be in this latter category.

At a strategic level stakeholders are agreed that all partners participate. As far as universities and colleges are concerned, it was remarked that ‘they all do their bit’, albeit, inevitably, some are more fully engaged than others: the partnership accommodates different levels of involvement. Partners from a range of constituencies consider that a positive feature of the Forum is that it facilitates key players meeting ‘round the same table’, actually and virtually. This has a number of benefits, including bringing the local universities and colleges – some of which would otherwise not have occasion to meet - into contact with one another in a productive and positive context with common aims.

At practitioner level, the partnership is thought to be working well across the board. In this context, meeting structures are considered to be inclusive, communication – e-mail and telephone – regular, and project staff always contactable. Stakeholders at practitioner level particularly appreciate that the Forum provides a network whereby people working in similar areas can find out what others are doing, which in turn assists their own thinking. As recorded above, the Forum has begun to brand its activities. Practitioners reported that they find this useful when communicating

amongst themselves and with other professionals – they cite the Forum as an ‘official stamp’ when booking rooms, for example.

The Forum Annual report records that a great deal of effort is expended on ‘achieving consensus and establishing common agendas’ and also that greater engagement with staff at all levels in partner institutions and organisations will be taken forward in 2006/07.<sup>3</sup> Joint staff development programmes focused on issues of common concern are thought to be a particularly productive way forward. A training session provided by the Scottish Further Education Unit, and run by a well-known and respected expert, was cited both as an excellent illustration of the Forum’s partnership approach to working and as an effective means of addressing awareness issues. The expert had attracted a diverse audience that had learned as much through mixing informally with each other at the event as they had through the programme itself.

### **Partnership perceptions**

We explored with partners their thoughts on how the Forum works and this yielded some important messages. We found no doubt that the Forum appears to be working rather well. Success to date is attributed, in particular, to the Forum’s generic approach, i.e. working to improve understanding of FE and HE on a broad front to help people make informed choices rather than to recruit to a particular institution. The Forum has been sensitive to existing partnerships and relationships and has sought to fit in with, and add value to, existing structures rather than to invent an additional layer. Similarly, the Forum has developed activities that go with the grain of, and are complementary to, local strategies. In addition it has been open to innovative, imaginative and sometimes experimental approaches, e.g. drama, DVD and video. The Forum’s achievements to date are seen to be a function of hard work on the part of individuals to create a positive climate for collaboration, and an able and sympathetic central team that actively consults and engages with partners.

### **Conclusions**

- The picture of partnership progress that emerges overall is positive. From arguably adverse circumstances, a firm and workable set of partnership arrangements has been forged, to which all partners contribute and from which all partners benefit, in their different ways.
- The approach of Forum staff, in particular, has been crucial to bringing this position about and is acknowledged and appreciated by all stakeholders.
- Work raising and maintaining levels of mutual awareness and understanding amongst partners will require ongoing attention and activity. Continued investment in staff development will support this, as should the planned implementation of a communications strategy in 2006/07.

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### Group 3: Learning and capacity building

This set of measures is critical to sustaining and improving the Forum's activity in the medium to long term. Measures here fall into two categories: people development; and learning. The former is staff development, while the latter is concerned with identifying and sharing good practice and realising opportunities at the national and local level

Relevant box on Strategy Map		
	Box ref. no.	
Enabler	24	Programme of staff development
	28	Share best practice
	34	Respond to local and national policy initiatives

#### ***People development (24)***

We have been made aware of a number of positive steps on staff development, with activity on the schools front – e.g. the LIFT OFF Conference and Careers Service training on Careers Box – attracting particularly favourable comment. In addition, as we record in Partnership Effectiveness, the use of external experts to develop and provide staff training (relating to Confident Learners) appears to have proved particularly successful. Opportunities and events are being made available both to Secretariat staff and practitioners in partner bodies.

At the same time however, and perhaps unsurprisingly, we have been told that 'there's not a lot of mutual understanding' between the various sectors – schools, colleges and universities. The view is that efforts towards its development need to be kept up, if not increased, and that this should be easier now that the Forum structure and staffing are in place.

#### ***Learning - Sharing practice (28)***

Activities connected with identifying and sharing best practice also drew favourable comment. Specifically cited were Forum Team meetings; Theme meetings (considered to be a particularly constructive development, also helping to avoid duplication across individual projects); the Forum conference and Newsletters; and, with the consolidation of Themes and roll out of projects, parallel events and communications at this level. The overall impression is one of a reasonably high level of activity.

#### ***Learning - Realising opportunities at the national and local levels (34)***

Identifying and responding to local and national policy initiatives emerged as an area where progress to date has been especially encouraging. This success is attributed to the Forum's active and inclusive approach to partnership and its willingness to engage with a wide range of partners to explore possible opportunities to add value to their programmes. Local authorities, taking forward programmes under such initiatives as Determined to Succeed, Schools of Ambition and the NEET Strategy, appreciate this, as do the universities and colleges pursuing their individual initiatives to widen participation.

### Conclusions

- Useful activity is taking place in relation to staff development, but greater systematisation would be beneficial, building on the approaches that have proved most beneficial to date, notably linking to partner CPD programmes.

- Similarly, activity in relation to good practice is likely now to have reached the point where it will benefit from consideration in a strategic context in order to ensure that project outcomes are widely disseminated and embedded in practice.
- On the basis of stakeholder responses, the Forum appears to be pursuing its strategy of working with partners to enhance and complement their programmes of activity with a laudable degree of success.

## Group 4: Impact and customer service

Relevant Box on Strategy Map		
	Box Ref. No.	
Impact	1	Improved participation rates in HE and FE level programmes and other education and training among Forum target groups, contributing to the SE aim of widening participation in HE level programmes
Outcomes	2	Improved progression rates to HE and FE level programmes among pupils from target schools and/or pupil groups
	3	Improved progression to and within HE level programmes wherever they are delivered
	4	Improved progression to HE and FE level programmes and other education and training among adult learners
	5	Improved opportunities to access HE level programmes
	6	Activity placed on a sustainable footing
	7	Better informed decision making among target groups
	8	Raised aspirations for under-represented groups
	9	Enhanced achievement of individuals
	Enabler	29

This set of measures is critical to assessing progress in delivering desired outcomes. As such, it relates to the upper reaches of the Strategy Map where, as we have observed earlier, we would not expect there to be great deal, if any, measurable progress at this stage. The timeline is too short for the underpinning quantitative data to show movement that might be considered significant.

The measures fall into three categories: impact; customer service; and target group perception. The two first are linked by the extent of their dependence on quantitative data - notably relating to enrolment and progression - at project and overall national, regional and area level. Impact measures consider the extent of the Forum's effect through changes in target group behaviour and attitude, and customer service measures through target group engagement with the activities and resources made available. Perception measures view the Forum through target group responses to those activities and resources.

We make such comment as is possible at this stage in earlier sections, more especially in that dealing with Group 1 measures relating to Internal Management. There, we highlight the particular need to pay attention to securing and maintaining the data that will support judgement on the Forum's Outcomes and Impact.

## Conclusions

- It is still too early to make fully informed judgements about impact and customer service (as defined above). As stated earlier in the report, the logic behind the strategy mapping process is that an assumed link can be made between enablers, activities, strategy, outcomes and impact. With this in mind, the evaluation findings in these areas provide a basis for initial confidence that progress is being made.
- In order for more fully informed judgements to be made in our final evaluation report, serious attention needs to be given to developing the appropriate information base needed to support judgements about impact and customer service (in the form of robust quantitative data in an extended time series).

### 3. Conclusions and Next Steps

At this interim stage of our evaluation we conclude that:

- Morale in the Forum is generally high, with members enthused that ‘things are actually happening’.
- Many of the building blocks are being shaped and moved into place.
- There is a high degree of confidence in the Forum secretariat from all stakeholders.
- The networking and contact opportunities offered by FATWAF are appreciated by partners at both a strategic level and at operational level.
- There is evidence that FATWAF is adding value to existing activity by providing funding for extra and experimental activity as well as opportunities for colleagues in different institutions and roles to observe other practice and develop their own thinking. The Forum’s inclusive partnership approach appears to be working to good effect.
- The FATWAF brand is proving useful in the context of professionals and agencies dealing with each other. It is not well known by client groups, but does not need to be.
- Through re-organising into the two themes of Transitions and LIFT OFF, the Forum has arrived at a coherent and manageable structure within which the wide range of projects can be understood and operate. This structure could also help distribute responsibilities in a way that relieves the Forum Manager of undue pressure and thus puts the Forum on a more sustainable footing operationally.

Based on our consideration of the evidence, we make the following observations on steps the Forum should now be taking:

- The Forum should begin to exploit its organisational structure more fully for purposes of reviewing, reporting and reflecting on activity. Thus, Theme Management Groups should consider and report on their projects individually and collectively in the context of their Theme, and the Executive Group consider Theme reports in the context of the Forum’s overall aims and objectives. To do this it will need to be presented with the opportunity to consider information that includes background statistics and trend data on what is happening in the region and the areas within it. It will then need to consider the data it receives from the projects in this context. In this way, the Group will be in a more secure position to take a strategic view towards, for example, recommending where interventions might be stepped up or where decreased.
- Projects would benefit from help in setting and reporting on targets so that they can serve more effectively as indicators of progress and so guide and inform further activity.
- There is a close relationship between the developed evaluation framework and the monitoring framework required to manage the Forum’s activities. Reference should therefore be made to the structure of the evaluation framework – the strategy map, scorecard and measures – as part of the Forum’s future self-evaluation.

## Annex A

### Fife and Tayside Wider Access Forum Evaluation Framework

The evaluation framework for the Fife and Tayside Wider Access Forum was developed in consultation with senior managers and stakeholders within the Forum. As far as possible, the language used in the framework is from the documentation provided by the Forum: its strategic and operational plans 2004-2008.

The framework has been developed to allow both comprehensive and specific conclusions to be drawn. We worked with senior managers and stakeholders to identify:

- The key **Impact** that the Forum is expected to make;
- The desired **Outcomes** for the Forum;
- The **Strategies** which need to be in place to guide the Activities and deliver these Outcomes;
- The **Activities** (projects/services/initiatives) that the Forum must ensure are in place to deliver the Outcomes; and
- The **Enablers** – that is, the things which have to be correctly in place - to deliver the key activities (e.g. resources, improved partner communication, organisational development, IT systems etc)

There are two distinct parts to the framework: the **Strategy Map** (at A i below), and the **Balanced Scorecard** of measures (at A ii below).

The **Strategy Map** sets out the Impact, Outcomes, Strategy, Activities and Enablers that the Forum is intended to have. As evaluators we worked with partners and stakeholders first to identify the Impact that they were looking for the Forum to have. All agreed that it was:

‘Improved participation rates in HE and FE level programmes and other education and training among Forum target groups, contributing to the Scottish Executive aim of widening participation in HE level programmes’

That Impact therefore sits in Box 1 of the Strategy Map, at its apex. The next stage, once the Impact was agreed, was to look at the Outcomes that were critical to achieving that Impact. So, for example, ‘Better informed decision-making among target groups’ (Box 7) is deemed to be a crucial Outcome in order to deliver the Impact.

Next, we considered the Strategies that needed to be in place both to deliver the Outcomes and to guide the Activities, and then we looked at the Activities required to produce the Outcomes. The relationship between Outcomes and Activities is not necessarily a unique one and any given Activity may relate to more than one Outcome. So, for example, the Activity ‘raising awareness of learning opportunities’ can support all three Outcomes relating to improved progression (Boxes 2, 3 and 4) as well as ‘better informed decision making among target groups’ (Box 7).

Finally, for the Activities detailed in the Strategy Map to happen, appropriate Enablers need to be in place. The Enablers in the Map relate to all of the Activities detailed, and are the basic building blocks of the Forum. They are on the whole common sense or good practice, for instance 'deploy budgets effectively' (Box 20) or 'respond to local and national policy initiatives' (Box 34).

The second part of the framework is the **Balanced Scorecard** of measures. This acts as an organising framework to capture and cluster the Impact, Outcomes, Strategy, Activities and Enablers. In essence, it is an organising framework to help manage the evaluation in a cohesive and comprehensive manner.

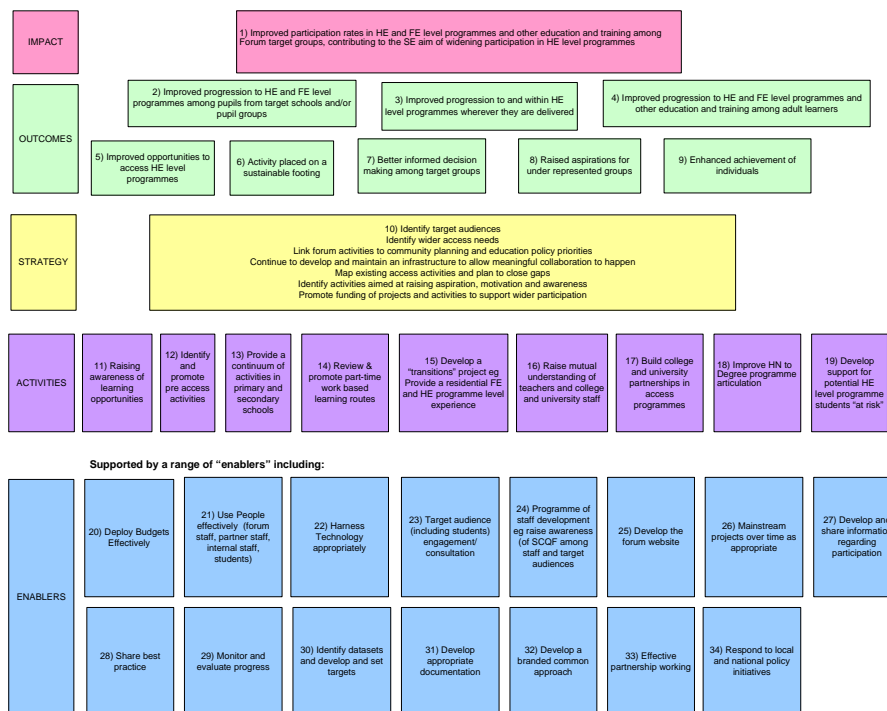
In the Balanced Scorecard, each one of the 34 agreed elements of the Strategy Map, categorised as relating either to Impact, or to Outcomes, or to Strategy, or to Activities or to Enablers, is allocated to the appropriate one of four groups of measures. The four groups of measures are as listed below; the allocation of the Map elements among the groups is shown in parenthesis.

- 1 **Internal management** - elements relating to managing the Forum's key processes: developing and implementing the activities and enablers and managing resources – finance, people and ICT.  
(a – activity development and implementation: 10;11;12;13;14;15;16;17;18; 19;26;27  
b – enabler development and implementation: 30;31;32  
c – resources (i) Finance: 20; (ii) People: 21; (iii) ICT: 22;25)
- 2 **Partnership effectiveness** - elements critical to building and capitalising on relationships between key partners.  
(33).
- 3 **Learning and capacity building** - elements central to sustaining and improving the Forum's effectiveness in the medium to long term.  
(a – people development: 24  
b - learning: 34;28)
- 4 **Impact and customer service** - elements critical to addressing the identified Outcomes and ensuring services to target audiences.  
(a – impact, and b – customer service: 1;2;3;4;5;6;7;8;9; 29  
c – target group perception: 23)

The Balanced Scorecard allows for a differing perspective in the evaluation. For example, the interim evaluation may look favourable because the majority of Activities are deemed to be making progress, or are close to being achieved. However that may mask the fact that, with regard to one particular facet - 'target audience awareness' perhaps - none of the activities grouped as relating to that area is making progress.

The combination of the two parts of the framework allows for a robust evaluation, which is fair and takes account of the complete picture of the ambitious programme the Forum has set for itself.

## Annex A (A i): Fife & Tayside Wider Access Forum Strategy Map



## **Annex A (A ii) Balanced scorecard of measures**

The scorecard headings and groupings of measures are set out below, with Strategy Map Box reference numbers in parenthesis. The detailed measures follow in appendix.

1. Internal management
  - a. Progress in 'activity development and implementation' measures (10;11;12;13;14;15;16;17;18;19;26;27)
  - b. Progress in 'enabler development and implementation' measures (30;31;32)
  - c. Resources management measures, including:
    - i. Finance measures (20)
    - ii. People measures (21)
    - iii. ICT measures (22;25)
  
2. Partnership effectiveness
  - a. Partnership progress measures (33)
  - b. Partnership perception measures (33)
  
3. Learning and capacity building
  - a. People development measures (24)
  - b. Learning measures (34;28)
  
4. Impact and customer service
  - a. Impact measures and (1;2;3;4;5;
  - b. Customer service measures 6;7;8;9;29)
  - c. Target group perception measures (23)

In each instance, the source of the information is given in brackets after the measure. There are three main sources, and the information will generally come from one of them:

1. Impact/progress information provided by institutions to, and published by, the Funding Council and HESA, and similar information published by the Scottish Executive.
2. Perception measures gathered through surveys by the evaluation team as part of the evaluation.
3. Action/progress measures co-ordinated by the Forum Manager as part of the strategy implementation.

## Appendix – Detailed Measures

### 1. Internal management (critical to managing activities and processes)

Progress in 'activity development and implementation' measures (all from monitoring of progress by the Forum secretariat)

- Progress in identifying target schools/pupil groups
- Progress in mapping existing study options available to potential and current students from target groups
- Progress in developing a programme of prioritised activities to close identified gaps
- Progress against key Forum Strategy milestones (largely picked up through other indicators)
- Progress in mapping learning opportunities
- Progress in articulating learning opportunities to target groups
- Progress in mapping current pre access activities
- Progress in implementation of pre access activities to close identified gaps
- Progress in mapping the current range of appropriate activities in primary and secondary schools
- Progress in developing activities to close any identified gaps in primary and secondary schools
- Progress in mapping current part time work based learning routes
- Progress in reviewing and promoting part time work based learning routes
- Progress in developing part time work based learning routes activities to close any identified gaps
- Progress in developing the 'transitions project'
- Progress in mapping current HN to Degree articulated programmes
- Progress in developing activities to close any identified gaps in HN to Degree articulated programmes
- Progress in mapping current support mechanisms for potential HE students level programme 'at risk'
- Progress in developing activities to close any identified gaps in support for potential HE level programme students 'at risk'
- Progress in mapping current engagement/consultation mechanisms
- Progress in developing activities to close any identified gaps in engagement/consultation
- Development of mainstreaming criteria
- Application of mainstreaming criteria
- Number of mainstreamed projects

Progress in 'enabler development and implementation' measures

- Progress in mapping current information regarding participation
- Progress in developing activities to close any identified gaps in information regarding participation
- Progress with dataset identification
- Progress with target setting
- Progress in developing documentation
- Progress in developing a branded common approach

Resource management measures

*Finance measures*

- Levels of funding/financing availability (SFC, table 1 fact card)
- Levels of funding/financing uptake (SFC)
- Progress in mapping current Forum financial management arrangements (Forum secretariat)
- Progress in identifying and implementing comprehensive Forum financial management arrangements (Forum secretariat)
- Forum spend against budget (Forum secretariat)

*People measures*

- Levels of (relevant) people involvement (by categories of People) (Member organisations)
- People turnover and absence rates (by categories of People) (Member organisations)
- Levels of people satisfaction (by categories of People) (from partner survey work undertaken as part of the evaluation)

*ICT measures*

- Progress in developing the Forum web-site (Forum secretariat)

## **2. Partnership effectiveness (critical to building and capitalising on relationships between key partners)**

### Partnership progress measures

- Partner participation in Forum activities (including partner fulfilment of agreed contributions) (Forum secretariat)
- Progress in identifying and implementing mechanisms aimed at raising understanding of school, college, HEI and careers staff (Forum secretariat)
- Levels of understanding among school, college, HEI and careers staff (Forum secretariat)
- Progress in mapping current HN to Degree articulated programmes (Forum secretariat)
- Progress in developing activities to close any identified gaps in HN to Degree articulated programmes (Forum secretariat)
- Extent of information sharing between partners (Forum secretariat)

Partnership perception measures (all from partner survey work undertaken as part of the evaluation)

- Partner perceptions of change in levels of awareness of learning opportunities amongst target groups
- Partner satisfaction with the continuum of activities in primary and secondary schools
- Partner satisfaction with the part time work based learning routes
- Partner satisfaction with experimentation and innovation
- Partner satisfaction with the 'transitions project'
- Partner satisfaction with HN to Degree articulated programmes
- Partner perceptions of effective use of People (by categories of People)
- Partner satisfaction with support mechanisms for potential HE level programme students 'at risk'
- Partner perceptions of effective financial management and resource allocation
- Partner satisfaction with the level and nature of engagement/consultation
- Partner satisfaction with the staff development programme
- Partner perceptions of the web-site
- Partner perceptions of mainstreaming
- Partner satisfaction with information sharing
- Partner satisfaction with best practice information sharing
- Partner satisfaction with datasets and target setting
- Partner satisfaction with documentation
- Partner perceptions of a branded common approach
- Partner perceptions of effective partner participation
- Partner perceptions of the appropriateness and effectiveness of responses to local and national policy initiatives

### **3. Learning and capacity building (critical to sustaining and improving the Forum's activity in the medium to long term)**

People development measures

- Progress in developing and implementing staff development programme (Forum secretariat)
- Staff development programme uptake (Member organisations)
- Participants satisfaction with the staff development programme (Member organisations)

Learning measures

- Progress in identifying best practice (Forum secretariat)
- Extent of best practice sharing (Forum secretariat)
- Identification of relevant local and national policy initiatives (Forum secretariat)
- Progress in implementing responses to local and national policy initiatives (Forum secretariat)

#### **4. Impact and 'customer service' (critical to assessing progress in delivering desired outcomes)**

##### Impact measures

- Levels of target group participation at each level (Parentzone, SFC)  
(In addition to these sources, we are looking at how the Forum can measure this to give an indication of how successful we are in reaching target groups in DZ5 areas – We hope we will be able to do this in a fairly simplistic way – by matching postcodes).
- Levels of progression of target school students/pupil groups to HE and FE level programmes (Parentzone)
- Levels of progression from non-advanced programmes to advanced programmes (College and HEI members)
- Levels of progression within HE level programmes (HEI and College members)
- Change in levels of awareness of learning opportunities amongst target groups (Survey work as part of the evaluation)
- Growing awareness about the benefits of learning amongst communities (wider local authority survey work ... likely for the future)
- Changes in attitude amongst target groups in primary and secondary schools (Survey work as part of the evaluation)
- Number (and/or %) of target group adult learners progressing to HE level programmes, FE level programmes, and other education/training (member organisations)
- Levels of student participation and retention (SFC)
- Levels of expressed demand for HE level programmes (Survey work as part of the evaluation)
- Progression within/from FE and HE level programmes amongst target groups (Member organisations' projects funded by Forum)
- Attainment of qualifications by target groups (Parentzone for schools only – we will need to look at other ways to measure this for other groups).

##### Customer service measures

- Uptake of pre access activities (Member organisations)
- Uptake of activities in primary and secondary schools (Local authority member organisations)
- Uptake of part time work based learning routes (Member organisations)
- Uptake of the 'transitions project' (Member organisations)
- Target group uptake of support mechanisms for potential HE level programme students 'at risk' (HEI and College members)

The above should be measured by Forum funded projects. Each project will be provided with useful guidelines by the Forum against which they can set their evaluation strategies.

- Level and nature of engagement/consultation (Member organisations)
- Web-site 'hits' (Forum monitoring)

Target group perception measures (all from target group survey work undertaken as part of the evaluation)

- Target group perception/awareness of information made available to them
- Target group perception/awareness of current course/subject choice
- Target group perception/awareness of Education provider
- Changing perceptions of target groups towards higher education
- Target group satisfaction with individual activities and wider continuum in primary and secondary schools
- Target group satisfaction with pre access activities
- Target group satisfaction with part time work based learning routes
- Target group satisfaction with the 'transitions project'
- Target group participation in HN to Degree articulated programmes
- Target group satisfaction with articulation opportunities
- Target group satisfaction with support mechanisms for potential HE level programme students 'at risk'
- Target group (including student group) satisfaction with the level and nature of engagement/consultation
- Target groups perceptions of the web-site