A three-step evaluation tool for outreach to adults from disadvantaged backgrounds[1]

Three underlying principles emerge from the case studies which have informed the development of an iterative three-step evaluation tool to stimulate and monitor the impact of university outreach activity with adult learners from disadvantaged backgrounds (ALDBs). First is institutional culture, and a willingness to take the needs of adult learners seriously (institutional advocacy). Second is the institutional understanding of the diverse needs of (usually) local adult learners (institutional intelligence). Third is the practical commitment to analysing the impact of any interventions aimed at adult learners through the perceptions of the learners themselves (personalised understanding of impact). For institutions in the early stages of engaging with ALDBs as part of their efforts to widen participation, the three steps are best undertaken in order – the first is a critical underpinning for the second step, and the second is needed to inform the third. For institutions with a track record of engaging with ALDBs, the steps may be undertaken in parallel.

Step 1 involves an institutional health check. The case studies revealed the fundamental starting point for meaningful and sustainable outreach with ALDBs to be the culture within the university. This can be represented in mission statements, in strategic plans, or in the energy and commitment of enthusiastic individuals. But for adult outreach to be meaningful, coherent, strategic and valued, there has to be a 'climate' of adult learner awareness in the institution. The more central this is to core activities, the greater the likelihood of resources to re-balance the culture to one in which adult learners have a greater priority.

The tool is designed to enable those colleagues charged with reporting WP progress through annual Access Agreements to rank their university 'readiness' for adult learners and to identify the appetite for doing more to widen participation by targeting accordingly. The 1-4 scale enables relative strengths and weaknesses to be noted and the total could be monitored on an annual basis, which could, as appropriate, inform OFFA of progress in this area.

Step 2 involves reflection on the kind of activities that might be utilised with ALDBs. Drawing on the range of interventions described in the case studies, a set of factors ranging from adult-friendly IAG, learner support, marketing, flexible curricula and progression routes can be evaluated. Current adult learners and WP practitioners might be involved in scoring against the 1-4 scale in order to rate the suitability for ALDBs of current and planned outreach. The individual elements and the total could also be tracked over time, and could, as appropriate, be used to inform operational reporting to OFFA through Access Agreements.

Step 3 focuses institutional evaluation on key elements that the case studies suggest remain significant barriers for ALDBs. These are distinctive to adults returning to study, and take the purpose of outreach back to where it belongs – to the transformative impact on the individual learner, rather than the all-too-common default of institutional recruitment data. Participants in outreach activities could complete a version of the simple matrix, to provide much-needed evidence for the sector of the extent to which confidence and self-belief have been enhanced, study skills and attainment improved and sector understanding enriched by engaging with the WP outreach provided. This personalised evaluation could also inform a more supportive bridge to undergraduate tutorial/study support for ALDBs.

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[1] Butcher and Fowle, 2017

Instructions for completion

In consultation with the Office for Fair Access (OFFA) we have developed a 3-step evaluation matrix in order to help higher education (HE) institutions reflect upon their commitment to meeting the needs of ALDBs. This is intended to provide institutions with a rationale for decisions they might need to make about the reprioritising of resources to support ALDBs. Completion of the matrix could also provide evidence of impact to include in annual Access Agreements. We acknowledge that different institutions will be at different stages of engagement in outreach to ALDBs based on their differing missions and strategic priorities. However, in initial consultations around drafts, feedback has been received that the evaluation matrix offers a valuable stimulus to discussions around the extent to which institutions are:

1. Aware of the needs of adult learners

   Which in turn informs

2. The tailoring of outreach activities to ALDBs

   Which in turn needs to be evaluated in order to

3. Inform evidence-led practice of the impact of outreach activities which contributes to sustainable enhancement of outreach to ALDBs

We suggest that this three-step matrix is completed as part of a preparatory discussion around the content of the institution's Access Agreement, which includes a senior university manager, a widening participation (WP) practitioner and a current adult student (the latter may be particularly helpful for Step 3). This will ensure a range of different perspectives on the adult learner experience are recognised. In testing the first draft of this matrix it became apparent that some institutions have strong pockets of activity in this area but do not score well across the whole university. It may be that the tool is employed initially at a faculty level and results are then synthesised into a whole institution score. For those institutions at early stages of their engagement with adult learners a sequential stepped approach would enable relative strengths and weakness to be noted. Alternatively for institutions with a more developed approach the matrix steps could be completed in parallel rather than sequentially in order to signpost areas in which key decisions need to be made.

The primary value of the matrix lies in the prompting of discussion around institutional approaches to the needs of ALDBs. This could enable a rough measure of institutional commitment to ALDBs, as one element of widening participation, to be monitored internally year on year.

Step 1: Is your institution ready for adult learners from disadvantaged backgrounds?

	To a great extent (4)	Somewhat (3)	A little (2)	Not at all (1)
To what extent are adults a WP priority in your **Access Agreement**?				
To what extent does your institution have **benchmarks** to measure recruitment, retention and achievement of ALDBs?				
Does your **Widening Participation/Access Strategy** make reference to adult learners				
To what extent is your focus on those adult learners studying: **full- time**				
part-time				
To what extent are institutional **resources** deployed with ALDBs in mind?				
To what extent does your institution provide **facilities** to support adult learners eg. Crèche, flexible library opening hours, accessible public transport?				
To what extent is the approach to ALDBs **centrally coordinated**?				
To what extent is your **timetable** sufficiently flexible to meet adult learners' needs?				
To what extent is this **consistent** across the whole institution?				
To what extent are **academic staff** aware of the needs of adult learners and in a position to respond?				
To what extent are **student support staff** aware of the needs of adult learners and in a position to respond?				
To what extent are the needs of adult learners included in the **induction** of all student support staff?				
To what extent do you have a **financial support** package appropriate for ALDBs?				

How **visible** is any financial support package to prospective adult learners?				
To what extent does your **institutional culture** (try asking your students) create an environment to which adult learners feel they belong?				
To what extent does the Student Union take the needs of adult learners into account?				

Step 2: How 'fit-for-purpose' are your planned outreach activities for adult learners from disadvantaged backgrounds?

	To a great extent (4)	Somewhat (3)	A little (2)	Not at all (1)
To what extent does your institution **target outreach** specifically at ALDBs?				
To what extent do you engage with your **community** at a local level				
To what extent do you provide targeted **taster sessions** for adult learners				
To what extent does your **marketing** represent and appeal to adult learners eg. prospectus and bespoke leaflets, website case studies and/or images of adult learners and use of **appropriate** social media platforms				
To what extent does your institution support a mature learner **community** as part of a commitment to a student lifecycle approach				
To what extent does your institution provide **individual support** for adult learners eg. learning champions/mentors				
To what extent does your institution provide **specialist IAG** for adult learners				
To what extent does your institution offer clear advice around **progression pathways** (through the website or student advice channels) including the recognition of prior learning?				
To what extent does your institution offer a **preparatory curriculum** to support adults taking their first steps to HE?				
To what extent does your approach recognise and respond to the **unique and diverse** characteristics of adult learners?				
Adult learners begin their educational journeys from different starting points. To what extent is your approach to outreach sufficiently **flexible**?				

To what extent is your approach to outreach coherently **sustained** through				
a) Working in **partnership** with other organisations?	a)			
b) **Planned** programme of activity?	b)			
c) **Evaluation** of previous activity?	c)			

Step 3: What is the impact of your planned outreach activities on adult learners from disadvantaged backgrounds?

	To a great extent (4)	Somewhat (3)	A little (2)	Not at all (1)
To what extent do you have robust **methodologies** to track the progression of adult learners?				
To what extent has the targeted activity contributed to the individual **learning gain** of adult learners:				
a) Increased **confidence** (can cope in HE)	a)			
b) Improved **study skills**	b)			
c) Higher **attainment**	c)			
d) Increased **self-belief** (can envisage success)	d)			
e) Increased **understanding** of the HE environment	e)			
f) **Active engagement** in learning	f)			
g) Shaping their personal **learning journey**	g)			
To what extent have your outreach activities increased the number/proportion of adult learners at your institution?				

Next steps

Based on the discussion around the 3-step matrix and the scoring you agreed, we suggest the next step is to identify a series of actions which would widen participation to your institution by targeting ALDBs. For those institutions in the early stages of this work these actions may align with issues identified in Step 1. Other institutions might find their actions are more closely related to the outreach activities in Step 2 or will build upon recognition of the impact of those activities as identified in Step 3.

Action	Timescale	Responsibility	Resource implications	Measure(s) of success