

**WHAT WORKS?<sup>1</sup>**  
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**Abstract**

*In this paper I focus on two common concerns voiced by policy makers which impact on providers of continuing education, namely the economics of lifelong learning and the objective of widening participation to under-represented groups within a mass system. In the context of these imperatives, there is a clarion call of 'what works?'. In other words what are the benefits of lifelong learning and to whom? What types of interventions tend to be successful and which are transferable internationally? What tools do we have to measure impact?*

*I will draw upon both literature and work that we have carried out within the Centre for Research in Lifelong Learning at the University of Stirling to consider these questions, taking the perspective of a researcher within the field. My intention is to consider what questions can potentially be answered within a functionalist paradigm, and what intrinsically will be problematic in attempting this task. I will not so much concentrate on how institutions and their managers act, but on the basis by which these acts can be rationalised and justified. Of course actions taken by institutions are not always informed by research, and it would be naive to think that they always can or should be. Equally the evidence produced to inform rational actions, should that be the chosen course, is limited.*

## **Introduction**

A concern with 'what works?' permeates modern education, and lifelong learning and continuing education are not immune from that tendency. This functionalist perspective, focusing on solving educational problems using methods akin to those used in the natural sciences, is in the ascendancy in many societies. To quote TERN (2001):

'Education informed by functionalism includes most government training, re-skilling programs, most so-called upgrading, most continuing professional education, nearly all technical or vocational training and basic education run by schools, colleges and other school-like institutions and almost all technologically-mediated education'.

Governments and policy-makers (at least publicly) want answers to a range of 'big' questions within the domain of education, and are asking social scientists to provide some of these answers. For instance, in the UK, the former Secretary of State for Education and Employment, David Blunkett announced in 2000 that:

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<sup>1</sup> Some of this material is drawn from a more extensive discussion of issues related to inquiring into lifelong learning is forthcoming (Osborne and Edwards 2002). This particular paper was originally presented as an invited contribution at the European Universities Continuing Education Network in Pecs, Hungary in May 2002, as part of a workshop entitled 'New functionalism as an Impact of Mass Education' jointly facilitated with Professor Chris Duke of the Royal Melbourne Institute of Technology.

‘Social Science should be at the heart of policy-making. We need a revolution in relations between government and the social science community – we need social scientists to help to determine what works and why, and what types of policy initiatives are likely to be most effective’. (DfEE 2000)

The questions that government seek answers to lie within not only compulsory education, but also within the arena of lifelong learning and are particularly pertinent in an era of mass and universal education. We are in a period where most nations are seeking to increase and broaden participation to levels that would have been unthinkable only one generation ago. In the UK, for instance, the target for young people entering Higher Education is 50%<sup>2</sup>; in Finland it is 70% and, according to recent OECD statistics, in 1999 it had achieved 67% participation in bachelors’ or tertiary type A education<sup>3</sup>, the second highest in the world after New Zealand (OECD 2001a, p 148), and also had one of the highest completion rates at 34% (OECD 2001, p167).

In this context, the questions raised are quite straightforward, though the answers (as ever) are less transparent. For instance, what are the economic benefits of lifelong learning to nations, companies and individuals of the move to massification and onwards to universal higher education? What practices are most effective in widening participation rather than simply increasing it, and thereby securing greater social inclusion and reducing inter-generational poverty? A brief overview of the European Union’s Fifth Framework Programme of Research provides ample illustration that these concerns are firmly embedded in improving the socio-economic knowledge base (EC 2001a).

Our capacity to provide answers to these sorts of questions may be limited. Human behaviours are seldom predicted or explained by the approaches used in the natural sciences and there are severe limitations to the questions that can be feasibly answered in the ways that they are posed by policy-makers.

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<sup>2</sup> Very recently with concerns being expressed as to whether this target is achievable; the aim has been re-expressed by politicians in terms of ‘benefiting from a higher education experience’. This presumably allows the inclusion of any form of post-compulsory education deemed to be higher education, including that not within universities (e.g. at Further Education Colleges (FECs) as illustrated in the following text produced by the Higher Education Funding Council for England (HEFCE 2002, para 31). ‘The Government has set a target that, by the year 2010, 50 per cent of people aged between 18 and 30 should have the opportunity to benefit from HE. We see FECs, both directly and indirectly funded, as having a major part to play in achieving this target. We believe colleges are particularly well placed to offer locally accessible, flexible and supportive programmes which will attract new types of student from groups that are currently under-represented in HE.’

<sup>3</sup> According to the OECD (2001) higher tertiary level A education requires a minimum cumulative duration of 3 years full-time equivalent study.

In this paper I will raise issues concerning what answers researchers can potentially provide to some of the main questions in the field of policy-making for lifelong learning, and what the limitations of an approach that is purely situated in the functionalist paradigm might be. My selection of questions is biased towards particular areas of lifelong learning within my particular experience, but I hope will serve as illustrations for wider forthcoming discussions. Firstly I will express some thoughts about the relationship between research and policy. What role does it play and how much influence does it have? Then I will consider some areas of particular interest as previously signalled: economic benefits; widening participation; social inclusion. I aim to illustrate the discussion with examples that take both quantitative and qualitative approaches to problem solving.

### **Research and Policy**

It is clear from the work of a number of writers that research can only play a limited role in policy-making (Rist, 1998), and it may not provide the sorts of answers that politicians want, neatly packaged as ‘what works’. Indeed Hammersley (2001), drawing upon the work of Weiss (1977, 1979 and 1980), argues that it is not proven that ‘providing solutions to practical problems and evaluating them’ is the main contribution that research makes to policy. Weiss provides a neat typology of the forms of contribution that research might make, and is quoted in Evans and Benefield (2001). In addition to the *knowledge-driven model*, derivative of the natural sciences, that suggests that because knowledge exists there are pressures for its development and use, this classification adds the *problem-solving*, *interactive*, *political*, *tactical* and *enlightenment* models<sup>4</sup>. This classification makes it clear that the mere existence of research is no guarantee that it will be utilised in ways in which researchers might envisaged. Other recent work suggests that even if there were a well-developed evidence base for policy, research is translated and mediated in the movement from the academy or consultancy into policy decision-making processes (Stove, 1998).

This sort of debate about the function of educational research is familiar territory within the compulsory sector in the UK with the arguments for and against its utilitarian function subject to considerable debate since Hargreaves’ (1996) Teacher Training Agency (TTA) lecture.

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<sup>4</sup> *Problem-solving* refers to the direct application of the results of a study to a pending decision. The *interactive model* sees research as just one part of a complex process additionally involving other factors such as experience, political insight, pressure, social technologies and judgement. The *political model* envisages research as a political tool to support a particular pre-determined position. The *tactical model* uses research to delaying measure to avoid responsibility for unpopular policy measures. The *enlightenment model* sees research having an indirect effect with the concepts and theoretical perspectives of research having a pervasive influence on policy-making.

## **Economic Benefits**

Whether we look at European Union policy or that of individual national governments, it is the economic benefits of lifelong learning that are at the fore. Since the development of European Union policy in relation to lifelong learning in the early 1990s<sup>5</sup> the importance of continuing investment in education and training has been associated with benefits to the individual, companies and the economy in general. The familiar policy focus is that for Europe to remain competitive in a global economy, in which there is rapid scientific and technological change mediated by new information and communications technologies, investment in human capital is vital. The recent Memorandum on Lifelong Learning (EC 2001b) is perhaps more wide-ranging in its scope, putting more weight on domains other than those related to employment and stressing more than ever before the role of lifelong learning in the realms of social inclusion and citizenship. However, in a press release on 21/11/01, Anna Diamantopoulou, Member of the Commission responsible for employment and social affairs, launching the European Area of Lifelong Learning reasserts the longstanding economic argument:

"Skill and competence enhancement in the new economy in Europe requires that the policy emphasis is shifted towards increasing investment in human capital and in raising participation in education and training throughout working life. To keep pace with developments in technology, globalisation, population ageing and new business practices, particular attention should be given to workplace training an important dimension of our strategy for Lifelong Learning (*sic*)."

(EC 2001c)

So do we have the evidence to support investment in lifelong learning from an economic perspective? Certainly at an individual level it is the benefits associated with employability, whether this entails obtaining a job or career promotion, that are seen as prime motivators for participation in post-compulsory education and training. Our own research within the UK on mature students returning to Higher Education (Davies et al 2002) provides ample evidence that individuals' decision making is mediated by economic considerations and there is plenty of evidence that at a personal level there are economic benefits from continuing education. There is a strong association between private economic benefits and level of qualification, which has been replicated in a number of studies (e.g. Independent Committee of Inquiry into Student Finance 1999). However, even here we have to introduce a number of caveats, the most significant of which is that delaying the investment reduces the return. Indeed models produced by Wolter and Weber (1999) in Switzerland show that if at age 40 a male invests in either an academic or vocational degree, he would reduce the present value of his lifetime earnings.

Here we can see that a functionalist approach might have some merit. The consideration of rates of return on investment in education and training might be a factor that could influence policy formation. Furthermore, a relationship appears to clearly exist between two variables, which can assist individuals in rational decision-making.

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<sup>5</sup> See Davies (2002) who provides a useful summary of the development of policy in the context of the Memorandum on Lifelong Learning.

However, such an approach is fraught with difficulties. Firstly, agreement has to be established as to what constitutes lifelong learning before attempts can be made to measure it. Secondly, tools would need to be established to reliably measure it. Thirdly, it may be that only some forms of lifelong learning secure economic gain, some are more effective at doing so and as is clear the timing of investment may be crucial. These are clearly issues of concern to the EU and a Eurostat Task Force on Measuring Lifelong Learning (TF MLLL) has been established 'to provide an overview of the available statistical information, to suggest improvements for the measurement of life long learning and to encourage the exchange of information and experiences' ((CEIES) European Advisory Committee on Statistical Information in the Economic and Social Spheres 2001. The OECD (2001b, p.145) further re-iterate these issues. In the context of lifelong learning it reports that the 'rate of return and other forms of programme evaluation are plagued by the non-availability of data, the heterogeneous nature of provision, the often informal nature of provision (as in many types of in-service training), the small scale of some demonstration programmes, etc'. So whilst personal benefits are well established in relation to participation in the formal sphere, the informal and non-formal areas present difficulties if we aim to determine measurable outcomes. A fourth difficulty relates to the information and guidance that is available to inform individuals in their decision-making. Successive studies point to the lack of appropriate guidance for adults, a factor so important that following consultation related to the Memorandum on Lifelong Learning, the EU has signalled that the role of information and guidance services should be better recognised and consolidated.

What then are the returns to enterprises and society from investing in lifelong learning? Here the relationship appears more nebulous and the link between investment in education and training and economic development is not clearly demonstrated in the research literature. The OECD reports that 'gains to society at large over and above those received by individual investors in lifelong learning' might justify interventions, perhaps in the form of subsidies by government, but the 'existence of such externalities is often asserted rather than supported by empirical evidence' (OECD 2001b, p46). The one area where the clearest evidence of societal benefit exists and concomitantly for government intervention is in fact based on US studies of investment in early childhood education and care. This investment according to human capital models not only leads to private returns, but is linked to wider economic benefits as measured by a reduction in the unit costs of primary and secondary schooling, greater completion rates and subsequent reductions in receipt of welfare, teenage pregnancy and crime (Verry 1998). Otherwise economic arguments that might justify government action are largely linked to job-related general training<sup>6</sup> where subsidies have been offered to encourage companies to make such provision.

Nor are the direct benefits to companies, particularly small to medium sized enterprises (SMEs), from investing in training as tangible as might be thought. Storey and Westhead (1994) contradict 'received wisdom' by arguing that it is difficult to see the impact of training on small business performance and this perhaps raises doubts about the real effectiveness of training in small firms.

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<sup>6</sup> *General Training* refers to a situation where 'a trainee's productivity is increased wherever the trainee is employed subsequently' and is contrasted with *Specific Training* that 'only increases the productivity in the firm providing the training' (OECD 2001, p47). The necessity of subsidy relates to the anticipation by firms that generally-trained employees will be lost to other companies, and without it there would be a sub-optimal amounting of training.

Our own research at both UK and European levels (Osborne et al 1996, Oberski et al 1999) finds little enthusiasm amongst SMEs for general or specific work-related training

The foregoing discussion therefore points to at best there being limitations in our capacity to determine economic benefits giving the current evidence base. It is therefore evident that benefits beyond the economic necessarily have and will play a key role in the lifelong policy debate, and this has become increasingly clear to policy-makers. I therefore turn to the widening participation agenda where the wider benefits of lifelong learning become more evident.

### **Widening Participation and Social Inclusion**

The issue of widening participation to higher education (HE) is central to policy debates internationally, and is concerned with not simply quantitatively increasing access, but providing opportunities to those who have previously been excluded. Widening participation manifests itself in a multitude of interventions, both within the formal post-compulsory sector, and increasingly within schools and through non-formal and informal provision. However, despite the developing interest in the field, (Council of Europe 1996, Eggins 1999, Woodrow 2000 and EURYDICE 2000), with some notable exceptions (Kaiser and De Weert 1994, Davies 1995, Schuetze and Slowey 2000), little work has been carried out to assess the effectiveness of provision and in particular of the possible implications of initiatives in one country for policy and practice in others. A range of national developments exist, which we have recently documented (Murphy et al 2002), these largely mirroring concerns expressed by the European Union since the White Paper on Lifelong Learning (EC 1995) in which the combating of social exclusion through offering 'second chances' was one of five main guidelines for action in striving for a knowledge-based society. This concern is now embedded in the Socrates II programme (EC 2000a) in the field of education, the continuation of the Leonardo da Vinci programme in Training (EC 2000b), and in particular in the Memorandum on Lifelong Learning (EC 2001b) where the EC's aspiration for the role European Social Fund is clearly enunciated:

'The European Social Fund (ESF) and the European Regional Development Fund (ERDF) can be utilised to support lifelong learning, as can the EQUAL initiative. The ESF in particular is the main Community financial tool for supporting lifelong learning'. (EC 2001b)

During the period 2000 –2001 we together with a team of colleagues internationally sought to map a range of initiatives that exist in five countries<sup>7</sup> outside Scotland with a view to determining what could be learnt from these and what is potentially transferable. I will not attempt to provide full details here as these are available in Murphy et al (2002) and in a forthcoming paper (Osborne 2002). Rather I wish to consider whether such an endeavour has merit, and what its limitations might be.

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<sup>7</sup> International collaborators were Glen Postle and Andrew Sturman of University of Southern Queensland (Australia), Cathie Dunlop of Simon Fraser University (Canada), Pat Davies, University of Sheffield (England), Matti Parjanen of University of Tampere and Ossi Tuomi (University of Helsinki), and Michel Fuetrie (University of Lille1). This work has been further developed into a proposal under the aegis of the European Commission's Fifth Framework Research Programme.

It is after all an exercise within the paradigm of ‘what works?’. Our project as a whole included a quantitative dimension, using existing datasets to determine what current evidence exist that could map the characteristics of higher education participants<sup>8</sup>. Without this work, the forms of qualitative work subsequently undertaken would largely be without purpose. It is, however, this latter element of our project that I will focus on.

In summary during this qualitative phase we initially classified the range of interventions observable in the Scottish context within a three-fold typology. Access as *in-reach* refers to those programmes that prioritise recruiting potential students in to the institution; examples adult Access Courses and certain Summer School provision for school-leavers. Access as *out-reach* is typified by efforts to widen participation and involve partnerships with one or more of employers, schools and the wider community. Alongside in-reach and out-reach exist a number of initiatives that can neither be categorised primarily as either of these, but focus on transformations and adjustments to the structure, administration and delivery of HE programmes. The third category of Access as *flexibility* refers to systematic as against discrete provision and includes such structural arrangements such as the use of Accreditation of Prior Learning (APL), Open and Distance Learning and the use of Information and Communications Technology (ICT). Against this template policies and practices from Australia, Canada, England, Finland and France were compared and analysed and their implications for and potential transferability to Scotland were considered. This five country international study aimed to identify the key forms of intervention which have been put in place to break down barriers, and increase representation among under-represented groups within selected countries comparable to Scotland. It provided an overview of strategic initiatives in the field of access for under-represented groups at national and/or provincial (state) level, and formed the basis provide for a case-study of one institution which enabled the evaluation of the effectiveness of particular initiatives at local level. The five studies sought to highlight policies and practices that potentially could be the basis for potential policy levers and reward systems for the implementation of these practices in Scotland.

So what are the issues in attempting such the exercise of ascertaining what works in a certain country and whether it is transferable? Firstly, it must be emphasised that certain caution has to be taken when carrying out international comparisons, as they can be superficial and misleading and therefore unhelpful. International comparative educational research has a long and honourable history, but it is also characterised by doubt over the validity of the enterprise.

In the first instance, a choice of countries for comparison has to be made where meaningful matching can be made at different levels of analysis, making possible a multi-layered approach as advocated by Evans (1999). We started with the nation or region as the level of analysis, extracting from the literature dimensions for comparison that parallel policies and practices within Scotland. The dimensions that we used to choose these nations or regions were within the domains of geography, national and/or policy and institutional practice. At an institutional level within each country, we choose as case studies particular practices that lay within a typology of widening participation, constructed following an analysis of Scottish initiatives (Murphy et al 2002).

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<sup>8</sup> It should however be stressed that the quality of quantitative data in the field of widening participation is variable with wide variations inside and between nations discernable.

When conducting a comparative study in an international environment, another initial problem to come to terms with is the terminology being used. At first glance this may seem obvious and unproblematic, but concepts like an *adult student*, *part-time student*, *continuing education*, *higher education* and *further education* are interpreted in different ways. Some of these have different meanings in different societies (e.g. adult student defined by different criteria in different countries). Some terms imply distinctions that are highly significant in some societies (e.g. part-time student in the UK), but which are much less pertinent in others; some structural terms are very country specific (e.g. 'further education' in the UK). Bourgeois et al (1999: 64-67) consider these issues in some detail as does Evans (1999). These terminological issues are never completely resolved, but the use of a multi-national and multi-lingual team of researchers each of whom is well acquainted with their own system, and who are willing to debate and clarify terms in an iterative fashion, brings the possibility of clarification closer.

Problems also arise that are intrinsic to the methodology being used, though these aren't unique to international comparative work. In this form of research exercise we are clearly working in the interpretative domain, using qualitative approaches through a series of evaluative case studies, in this instance incorporating literature reviews and interviews. Much has been written about the merits and limitations of qualitative approaches, including case study approaches in education (Bassey 1999). Issues of methodology, analysis and interpretation are pre-eminent. Data collected has to be critically scrutinised with judgements being made about whether particular material should be included or not. Criteria have to be established for judging the procedural adequacy of how data was generated (Cooper 1989: 63) and to ensure the validity of a review outcome using procedures recommended by Cooper (ibid.: 79). In analysis and interpretation, sources have to be classified using the fields of categorisation previously delineated and then interpreted against a template of what their possible implications might be for future national policy.

In our analysis we could find plenty of examples of practice worthy of wider explication beyond their country of origin. These were *inter alia* concerned with aspects of national level planning, institutional strategies, the use of public-private partnerships, flexible structure (e.g. the use of single portals and credit frameworks), the use of Information and Communications Technology and staff training. It would be foolish to make claims in terms of 'what works', since such methodologies provide illumination of what is effective in one situation and what might be workable elsewhere, the sort of findings that Bassey (1999, p 51) describes as fuzzy generalisations. However, such findings are influential because as Weiss (1977) has indicated, the ways in which research influences policy are multiple, and we hope that our work at least provides enlightenment.



## **Conclusion**

It will be the case that in many arenas in lifelong learning and continuing education, as Elliot (2001, p560) suggests in the context of compulsory education, the social sciences can provide only limited empirical generalisations. Certain statistical regularities exist and links between certain variables are reproducible, for example, in surveys, such as those that demonstrate the relationship between self-ascribed motivation for participation and certain socio-demographic characteristics (Boshier and Collins, 1983). Such data could play a role in assisting policy-makers seeking to create the conditions that facilitate desired behaviours. Other even more fundamental research of a statistical nature is often necessary to scope and map the ‘problem’, providing baseline data, as in the case of providing a baseline data on the characteristics of participants in higher education, previously discussed. In other instances, of course, as I argued previously in the context of economic benefits of informal lifelong learning, agreement as to what the baseline consists of and ways of capturing it even when defined make quantification and the establishment of relationships if not impossible then very difficult.

In an era of attempts to develop evidence-informed policy, for the development of lifelong learning strategies, the evidence is either lacking or contradictory. At a nation state level in Europe, very few countries could boast that there exists a sophisticated database that could inform policy in relation to improving the prospects of the socially excluded, yet manifestly this is an objective and many have instigated practices to fulfil this desire.

It is clear that certain forms of evidence that *could* inform policy can be generated. That of course doesn’t guarantee that it will be used in the ways the researchers might wish or anticipate, because as Nutley and Webb (2000) suggest, policy-making is seldom rational. However, as questions become more complex, the certainties publicly sought by policy-makers, characteristic of the output of the natural sciences, are unlikely to be within the gift of much of current educational research. Weiss (1979) has indicated, in the *Interactive Model*, how research might be used by policy-makers; here researchers are but one part of a complex process that also utilises experience, political insight, pressure, social technologies and judgement. Like policy-makers, researchers too inevitably use their experience, insight and judgement when designing, carrying out and generating output from their research.

No doubt as increasing resources and effort are being devoted to developing successful systems of mass education, it is legitimate to ask questions as to the effectiveness of interventions. However, these questions are multi-faceted and one can only hope that researchers find ways to ensure that the diversity of the forms of evidence that they can provide in response receives due consideration. Otherwise policy-making by postulation would appear to be the order of the day.

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