

unionlearn

with the Midlands TUC



**Supporting union
learners into higher
learning in the East
Midlands –
a unionlearn
investigation and report**

Supporting Union Learners into Higher Learning in the East Midlands - a *unionlearn* investigation and report

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1. Foreword by Mary Alys , Regional Manager, *unionlearn* Midlands Region

The trade union movement has always supported access to education. Education helps improve democracy and the fight for social justice. The aim of trade unions and unionlearn is to open up learning opportunities for all, whether this is to help people access higher learning for the first time or to support members with their continuing education and professional development. Unions are working to support members into learning that is appropriate to their needs and starting point. Unions also encourage learners to fulfill their potential and help them overcome barriers that prevent them from fulfilling their aspirations.

It is for these reasons that unionlearn in the Midlands sought to develop partnership work with Skills for Sustainable Communities Lifelong Learning Network (SSCLLN) in order to develop regional progression routes to HE for learners in the East Midlands. The aim of our project was to scope union activity around progressing learners to HE and to seek views on learner aspirations and issues arising for them.

The findings of this report will enable us to develop progression pathways relevant to the needs of union learners in the region.

Hopefully this partnership project will lead to many more workers accessing HE and realising their aspirations and potential.

Author's Foreword

I would like to thank those members and union learning representatives who took time out from their busy working and personal lives to respond to my requests for information and feedback. I hope I have accurately reflected their views.

My thanks also to Laura Houghton of SSCLLN; to the members of the *unionlearn* Midlands team, particularly Gary O'Donnell, Regional Coordinator, for their help and support; finally, to Helen Nolan at the Trade Union Studies Department of South Nottingham College for help in getting to grips with the delights of spreadsheets.

Jake Jackson

Project Worker

May 2009

2. Introduction

"In future, universities will need to offer still greater diversity in methods of study, as well as qualifications, in order to satisfy what can only be a growing need for graduate-level workers. That means especially more opportunities for part-time study and study in the workplace"

John Denham MP, Secretary of State for Innovation, Universities and Skills. Speech to the Foundation for Science and Technology April 2009

"When I asked people about higher learning, some were put off by the term "higher learning". They immediately decided that it wasn't for them."

"Overall, I got the impression that people were ruling options out for themselves without getting sufficient information to make the decision."

"In my experience it's more acceptable to talk about the NVQ levels because that's what a lot of people already know about. If they have an NVQ at level 2 or 3 then they feel more comfortable to talk about the next level."

"Most people I approached were both baffled and resistant to the idea of doing higher level learning – but we do have people working in care services who have undertaken NVQs up to level 2 and have got a bit of a taste for learning. And they responded more positively."

Comments from Union Learning Representatives (ULRs) responding to the survey for this report.

This investigation and report was commissioned by *unionlearn* in the Midlands and carried out by Jake Jackson. It was funded by Skills for Sustainable Communities (SSCLLN), the Lifelong Learning Network covering Lincolnshire, Leicestershire, Rutland and

Northamptonshire, and carried out over the period from October 2008 to June 2009. SSCLLN was established in 2006 to develop and promote opportunities for people with vocational qualifications and/or experience to progress more easily into and through higher education. SSCLLN, one of many such networks set up from 2006, is concentrating on four industry sectors:

- Health and Social Care and Children and Young Peoples Services
- Creative Industries Sector
- Food and Drink Sector
- Construction Sector

Further details of SSCLLN's work appear later in this report.

The report has two broad audiences:

- Firstly, the ULRs and the *unionlearn* and union workers with responsibility for developing and implementing policy around learning;
- Secondly, policy makers and practitioners operating within Further Education (FE) and Higher Education (HE) in the East Midlands and within the government bodies and agencies in the region.

The primary aim of the investigation was to gain a picture of the interest in and awareness of higher level learning amongst TUC-affiliated unions in the counties of the East Midlands covered by SSCLLN. The investigation had two broad targets from which it aimed to draw information:

- ULRs
- Members and other workers represented by those ULRs who responded to a questionnaire survey

The results of the investigation are set out in the following pages and are preceded by an Executive Summary at section 3 .

In order to set these findings and the recommendations which flow from them in context, the report begins at Section 4 with a

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summary of recent, significant government action aimed at opening up higher level learning to a broader cross section of British society. As part of this context setting Section 4 also contains a summary of the higher learning and initiatives taken in the East Midlands.

In Section 5, there follows a further summary of initiatives taken by *unionlearn* nationally. These initiatives have taken advantage of funding and opportunities to create and trial programmes of support for higher level learning among union members. Central to much of this activity promoted by *unionlearn* since 2006 has been the ULR.

Section 6 provides a summary of the activity which *unionlearn* has taken to promote and expand learning leading to higher level in the East Midlands.

The findings of the surveys of learners and ULRs are set out in section 7.

Section 8 presents conclusions and proposals on a way forward for *unionlearn* in the East Midlands.

In addition to the report, the commission required the organisation of a conference to disseminate the report's findings and recommendations (to be held on June 16th 2009 in Leicester); arranging workshops for ULRs (See Section 7) and the publication of various leaflets.¹

¹ The first two of these leaflets, "Financial Help For Learners" and "Pathways to Higher Learning in the East Midlands", are available from *unionlearn* Midlands – email: unionlearnmidlands@tuc.org.uk

3. Executive Summary

The National Context

- Over the last 40 years several avenues were introduced to enable those without formal qualifications to progress to higher education (HE):
- Despite these developments, the government has identified a need to widen participation in higher education and to offer flexible forms of education for working people;
- The 2006 Leitch report showed that the skills base of the UK remains weak by international standards, holding back productivity, growth and social justice;
- Leitch proposed a target of more than 40 per cent of all adults to have a higher education qualification (level 4 and above) by 2020 – a target which was accepted by the government;
- Leitch proposed a “demand-led” system to be set up for all publicly funded, adult vocational courses;
- Employers have identified that the skills they want workers to gain or possess but which are generally lacking in the workforce;
- The government and higher education institutions (HEIs) have been criticised for failing to improve the ‘offer’ to adults and part time students;
- Government targets for the expansion higher education are likely to be impacted by the economic downturn – which conversely has resulted in an increase in applications from adults.

The East Midlands Context

- The East Midlands lags most other UK regions as far as learning and training is concerned;

- The Region was placed 7th out of 9 regions in the England in terms of the participation by people of working age in job-related training and has a lower proportion than the UK of people with level 4 or above qualifications;
- In 2006/07 adult participation in FE was severely affected by the overall drop in adult participation in learning;
- The East Midlands strategy prioritises increasing the proportion of those with Level 3 and Level 4 qualifications;
- The Regional Learning and Skills Council recognises that attitudes towards training and learning amongst East Midlanders represent a challenge;
- Routes to HE in the Region include Access Courses, Foundation Degrees and Work Based Learning;

The Union Context

- Unions have long recognised the benefits of higher learning for members and have long campaigned to open up the higher education;
- Unions have broadly welcomed the Leitch findings but are sceptical of its ‘post-voluntaristic’ approach;
- The research commissioned to underpin the *Trade Unions Aim Higher* project has shown that many existing members are already highly qualified and many were motivated to continue learning. However the survey also revealed substantial barriers in terms of time and money to access provision;
- The TUC concludes that there need to be more incentives for employers to provide paid time off to learn and contribute to fees; there need to be rights for unions to negotiate such opportunities; and much more

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flexibility in the delivery of provision is required, customised to the needs of the adult learner;

- It also identified that ULRs as playing an important role in helping and supporting their members to access higher education;
- Via the *Trade Unions Aim Higher* project, individual unions have demonstrated ways in which these aims can be met by developing tools, materials and forming new partnerships. In three regions pilot projects have been launched and evaluated;
- Key developments have been the partnership with the Open University, the setting up of Union Learning Clubs in Greater Manchester; and the wide scale provision and take-up of IAG training amongst ULRs in the North East.

Union Initiatives in the East Midlands

Recent regional initiatives have been taken by unions and *unionlearn* include:

- support for cohort of ULRs to undertake the NVQ in Advice and Guidance at level 3;
- a project to broker management skills via *unionlearn* and their affiliates offering access to the Institute of Leadership and Management's programme. ULRs were central to the promotion and take up;
- In 2007 *unionlearn* Midlands began work with the two Lifelong Learning Networks covering the East Midlands resulting in early initiatives.

Survey of Learners

The key findings Learners Survey carried in this project are:

1. **Access to ULR:** Half of all union members responding can call upon the services of their ULR.
2. **Profile:** Most of the respondents to this survey were:
 - female; in "white collar occupations" (67%);
 - earned less than £20000;
 - had 10 years service or less with their current employer;
 - Around 25% worked shifts or unsocial hours.
3. **Learning achievements:** Compared to the profile of the respondents to the *unionlearn* national survey, the achievements of East Midlands' respondents were generally lower but broadly similar.
4. **Opportunities for workplace learning** amongst the respondents were generally high: over 50% stated that their employer provided some form of learning or training opportunities at work or via work.
5. **The desire to undertake further learning and higher level learning was high:**
 - 77% wanted to undertake some form of further training or learning;
 - Over 60% stated that they had identified a course of learning they wished to undertake;
 - 44% stated that they wished to undertake a course of learning at higher level
6. **Perceived barriers:** A large number of respondents identified one or more barriers to further learning or training. Chief amongst these were:
 - Financial (fees and maintaining income);
 - Learning under their current workload.

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7. Needs identified for advice and support:

Well over half of the respondents needed some form of advice or information to help them identify or take up an appropriate course. Priority needs were for:

- Financial support available;
- Information on qualifications;
- options and arrangements for studying part time.

Survey of ULRs

- Overall the survey showed that ULRs perceived their skills and knowledge were weakest in terms of supporting members towards levels 3 and 4.
- Correspondingly the level of ULR interest in improving their knowledge and skills was greatest in terms of offering support to level 3 and 4 learners.
- Nearly three quarters of ULRs responded positively to the proposal to attend a workshop on “Supporting Members in Higher Learning” and over 90% were interested in starting an NVQ programme in Information Advice and Guidance.
- Comments offered by ULRs reinforce their need for improved information and the desire to see in place financial support for higher learning, arrangements that would be attractive to members at work and legal rights to time off for learning.

ULR Focus Groups and Pre Investigations

- Investigations by ULRs showed that while there is significant level of interest in higher level learning at the workplace amongst members, a large proportion of members (58%)

had no awareness of higher learning opportunities at their workplaces;

- By contrast there is high level of reported awareness of higher level learning opportunities outside the workplace;
- The barriers identified in this part of the investigation correspond with those identified in the learner’s survey and focus on time off and finance.

The focus group discussions show that:

- ULRs are keen to support members in higher learning but have distinct information and knowledge needs themselves;
- Few ULRs have experience of supporting higher level learners;
- ULRs have varied experience with employers – where there is outside regulation higher level learning can be achieved at work;
- ULRs have cited examples where learning agreements have helped introduce new opportunities but they are skeptical that government targets can be met without legislation requiring time off for learning.²

Overall Conclusions

- 1 The opening up of pathways to gain higher level qualifications and skills remains a vital component of the government’s economic and social justice strategies. It is recognized by unions as a key means by which members can increase their prosperity

² Since these forums were held the government has announced consultations on a proposed right to request time off for training, modelled on the existing rights to request flexible working
<http://www.dius.gov.uk/consultations/~-/media/publications/T/TimeToTrain>

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- and life chances and inequalities can be reduced.
- 2 There are nonetheless significant barriers remaining for many adult learners at work, especially those wanting to move to the cusp of HE.
 - 3 The surveys of learners and of ULRs in this project and elsewhere demonstrate a significant demand for higher learning at or via work but show that members and others at work lack information and guidance about financial and learning options. There is clearly a potential role for ULRs to play in tackling these barriers.
 - 4 Most potential higher learners see finance as a major barrier: This perceived barrier has almost equal weight as the lack of information about HE and problems connected with workload and release.
 - 5 ULRs are keen to promote higher learning and gain the information and skills needed to do that. However they identify a restrictive approach amongst some employers who view learning purely in job specific terms.
 - 6 *unionlearn* has been working with projects in the East Midlands that have successfully engaged hundreds of new learners in level 3.
 - 7 This project has identified avenues by which learners could access or gain higher level learning - however the level of information about these pathways and institutions amongst ULRs is low.
 - 8 Few ULRs in the Region operate within workplace projects which have gained the Matrix standard of Information, Advice and Guidance or gained the training to enable them to offer advice and guidance to higher level learners.
 - 9 The interest amongst ULRs in underpinning their skills and knowledge by gaining an NVQ qualification in Information, Advice and Guidance is high and is likely to succeed in attracting sufficient applications to form one of more cohorts of ULR learners.
 - 10 *unionlearn* in other regions has developed models to create progression routes to level 4. While some initiatives have been taken in the *unionlearn* Midlands region to support higher level learning comprehensive "higher level offer" for union learners has yet to be developed.
 - 11 These survey results give support to the development of a *unionlearn* programme of training to target the skills and knowledge of ULRs.

The Way Forward in the East Midlands

Unionlearn will aim to take action in seven broad areas:

1. **Direction towards Higher Learning:** *unionlearn* to concentrate its efforts in the immediate future to creating support mechanisms for union-learners to access level 3 and create union-appropriate pathways to progress to level 4.
2. **Seminars:** convene a series of seminars for institutions and bodies in the East Midlands with the aim of disseminating the findings of this investigation.
3. **ULRs:** prioritise the training and support of ULRs in the first instance. *Unionlearn* in the Region should use the interest demonstrated by ULRs via this project to:
 - a) offer workshops and familiarisation events for ULRs and members on higher level learning;

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- b) seek to develop and distribute a pamphlet to inform ULRs about higher level learning in the East Midlands ;
 - c) continue to offer advice and guidance to unions and employers seeking to support ULRs through the NVQ in Advice and Guidance;
4. **Build on *unionlearn*'s Level 3 initiatives in Region:** create a systematic follow up on learners who attended the ILM courses and workshops (at level 3) over the period 2007-08 to inform them of the pathways and possibilities for further and higher learning in conjunction with Next Step.
 5. **Develop Access Courses:** build on the work of Lifelong Learning Networks in the East Midlands by inviting them and the Region's HE institutions to investigate the development of "union-friendly" access to higher education courses.
 6. **Work with the Open University:** convene a separate discussion with OU in the Midlands to build on the higher level work done nationally and in regions by *unionlearn* and individual unions including the possibility of creating union learning clubs in the major East Midlands conurbations.
 7. **Redundancy Support:** to create region-specific advice and information about the role and benefits of higher education for union members facing redundancy in conjunction with appropriate bodies.

4. The Wider Context: Higher Learning and Skills in the 21st Century

Higher level learning is generally considered to start with level 4 after someone has demonstrated an educational achievement to a standard equivalent to that required for A level.³ Higher Education was the term usually applied to this level of learning in the 20th century. It was traditionally the preserve of universities and training colleges. Until the 60's it was accessible, with few exceptions, only to a limited section of society – those who overcame the hurdle of the 11+ and could see a route worth pursuing via A levels and beyond. A large part of the 3-5% of school leavers in the 60's who made it through to HE remained a privileged elite. Opportunities for adults to catch up improved with the arrival of the Open University in 1962. And over the last three decades the number of people in Britain who start and achieve a higher qualification has grown considerably as a result of programmes of expansion in secondary education and of HE institutions (HEIs)⁴.

Unions have long recognised the personal and material benefits of higher learning for members, both in terms of widening and deepening knowledge and gaining access to occupations which offer greater pay and, for many, routes out of deprivation. They have campaigned to open up HE to those with low income or with limited outcomes from their

time at secondary school. Unions have also backed, promoted and funded HEIs founded in the late 19th and early 20th centuries which cater for adult learners who came to higher learning after starting work - often many years later. This was the route into paid employment with unions or other organisations for numerous activists.⁵

Despite the expansion and programmes to open up higher level learning, by the late 20th century it was recognised that the UK was failing to produce sufficient highly qualified graduates to meet the future needs of its economy. It was in this context that the Leitch report, *Prosperity for all in the Global Economy – world class skills*⁶ was delivered.

The Leitch Report

Leitch reported that the skills base of the UK had improved significantly over the decade between 1995 and 2005 with rising school standards and growth in graduate numbers.

“Despite this, the UK's skills base remains weak by international standards, holding back productivity, growth and social justice. Even if current targets to improve skills are met, the UK's skills base will still lag behind that of many comparator countries in 2020. The UK will run to stand still unless greater investment is made in skills.”

Leitch identified serious implications of failing to move the UK skills base forward:

“As a result of low skills, the UK risks increasing inequality, deprivation and child poverty, and risks a generation cut off permanently from labour market opportunity.”

³ See Appendix 2 for examples of qualifications within the national framework

⁴ There were 3.6 million [2.5 million part-time] further education students during the academic year 2006/07, compared with 2.2 million in 1990/91. – a 63% increase. There were 2.6 million [1.0 million part-time] higher education students in the academic year 2006/07 compared with 1.1 million in 1990/91 – a 136% increase.

<http://www.dcsf.gov.uk/rsgateway/DB/VOL/v000823/index.shtml>

52% of first year undergraduate students are mature students. Higher Education Statistics Agency (HESA) (2005): Students in Higher Education Institutions 2003/04, tables 1b, 1f

⁵ See “The TUC And Education Reform 1926-1970” by Griggs, Clive 2002 ; “Bread On The Waters: History Of the TGWU Education 1922-2000” by Fisher, J. 2005

⁶ Leitch, S. “Prosperity for all in the Global Economy – world class skills”. HM Treasury, December 2006. See: http://www.hm-treasury.gov.uk/leitch_review_index.htm

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With regards to higher skills, one of Leitch's significant recommendations was to shift the focus from young people aged 18-30 towards all adults. To achieve this there needed to be a transformation in the way education and training providers worked with employers.

What Leitch proposed was a "demand-led" system to be set up for all publicly-funded, adult vocational skills. Essentially this meant that the "voice of employers" should be heard by all bodies and institutions in the system and that they should respond to this voice as a priority. New institutions should be set up to make the employers' voice heard (Commission for Employment and Skills). Existing institutions (such as the Sector Skills Councils) should be re-focused in order to hear the voice of the employer.⁷

Employers have let the government know that what they want are workers who have good skills in team-working and communication, and good skills for life, such as English and maths. In addition, employers say more modern foreign language skills are needed in order to improve their competitiveness in the global economy. However, participation rates in these subjects are declining. Employers also need support for formal qualifications in management and leadership skills and in business improvement techniques in order to drive up productivity and sustainability.

Even before Leitch reported, there had been recognition that the system of HE in Britain

⁷ "The Review recommends that employers drive up attainment of intermediate and high skills, including in Apprenticeships, led by SSCLNs and skills brokers. As with qualifications, LLLSSCs should control the content of Apprenticeships and set attainment targets by sector. This should lead to a boosting in the number of Apprenticeships in the UK to 500,000 a year by 2020.... The Review recommends widening the focus of HE targets to encompass both young people and adults via workplace delivery. This will dramatically improve engagement between HE and employers." Leitch, S. "Prosperity for all in the Global Economy – world class skills". HM Treasury, December 2006. See: http://www.hm-treasury.gov.uk/leitch_review_index.htm

required significant change to open up it up to a wider range of people, especially working people. Three initiatives were significant:

1. Widening Participation in HE: The Government's 2003 White Paper, *The Future of Higher Education*⁸ set out the need for HEIs to widen participation in HE and to offer flexible forms of education that people at work could take advantage of. For this purpose a Strategic Development Fund was set up. Since its inception grants totaling over £490 million have been made to HEIs and partners.⁹

Drawing on these monies Lifelong Learning Networks (LLNs) were set up in each English region. LLNs are partnerships of HEIs and FECs (along with key partners such as Aimhigher, Regional Development Agencies, Sector Skills Councils, and local employers) to develop new pathways to HE for people at work. They are a significant means by which "employer engagement" is achieved.

The core aims of LLNs include:

- Curriculum development to facilitate progression; to remove barriers to progression and bridge provision that forms part of the HE offer; and develop new HE curriculum involving employers (foundation degrees, work-based learning, e-learning, collaborative modules).
- To develop information, advice, guidance and learner support systems that allows LLNs to engage, and track, learners in the context of lifelong learning opportunities.

⁸<http://www.dcsf.gov.uk/hegateway/strategy/hestrategy/>

⁹<http://www.hefce.ac.uk/learning/flexible/>

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- To produce network-wide progression agreements¹⁰ that develop mechanisms to agree and manage progression and ensure they operate across the LLN.

In addition the Strategic Development Fund has been used to support “pathfinder” projects among a limited number of universities, including two in the East Midlands, at Northampton University and the University of Derby.

A significant role has also been played by the HEFCE Workforce Development Programme, running from 2008-2011, which seeks to develop relationships between higher education (HE) and employers.

The programme has two broad aims to design and delivery of HE courses in partnership with employers, and to increase the number of learners in the workplace supported by their employers. Over £60 million has been invested via the programme. In the East Midlands De Montfort University has secured £4.379m for the development of flexible, work-based learning packages tailored to the needs of Small and Medium-Sized Enterprises. The University of Derby has secured funds of £4.265 to develop the university’s flexible framework for bespoke and shorter awards so as to increase employer engagement¹¹.

Despite these developments the Government is indicating that more needs to

be done and quickly¹². In 2008 the government set out proposals¹³ to improve the numbers of adults who achieve a higher qualification. It recognised that:

“Improving the progress of school leavers into higher education will be necessary, but not sufficient to meet the skills needs of the future. Around three-quarters of the 2020 workforce have already left compulsory education. So we need more people currently in the workforce to acquire high level skills.

There are obstacles to engaging employers and employees. Employers may be reluctant to train where they do not understand what a modern university can offer. Employees have to balance commitments to work and family. But research suggests there are almost two million people in the labour market potentially prepared to access higher education”

2. Access to HE Courses

Access to HE courses have been around since the 1970s and have been designed and developed with the support of universities. *Access to HE* courses are overwhelmingly delivered by Colleges of Further Education (CoFE). In 2006/07 there were 371 providers of *Access to HE* courses in 2006-07 in England and Wales. In general no formal qualifications are needed to begin the course but through the process of interview and APEL /

¹⁰ Progression agreements will support learners' progression from specific programmes or institutions to other programmes or institutions, and establish the commitment of institutions to enable this to happen. They will cover progression from level 3 to level 4 as one of the key transition points from one institution to another. They are developed on a network-wide basis, with all the institutions that form part of the LLN <http://www.hefce.ac.uk/widen/lln/progress/>

¹¹ For details see

<http://www.hefce.ac.uk/econsoc/employer/projects/> and “*Stepping Higher -Workforce development through employer-higher education partnership*” http://www.hefce.ac.uk/pubs/rdreports/2008/rd21_08/

¹² “...despite progress, it is not clear that our publicly funded degrees offer the range and balance of qualifications which students and the wider economy require. Increasing numbers of young and older people will reach the threshold of university education through almost exclusively vocational routes. It’s fair to ask whether these students have sufficient chance to gain higher levels of skills and qualifications in our education system. If not, then higher education will need to meet these needs in future.” John Denham MP, 2009; *ibid*

¹³ Higher Education at Work High Skills: High Value: DIUS 2008 http://www.dius.gov.uk/consultations/~media/publications/Higher_Education_at_Work

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APL¹⁴, assessments are made of applicants' skills and ability to undertake the course.

The *Access to HE* qualification is widely recognised by UK universities. Each year, around 20,000 *Access to HE* students apply to universities across the UK. In 2006-07, 74% of *Access to HE* learners were women and 24% were from minority ethnic groups. There are over 1,000 different courses leading to the *Access to HE* Diploma and courses are available in most further education (FE) colleges in England and Wales. In 2006-07, 62% of students gained the award and over 80% went on to study at HE.

The courses are designed to address the needs of mature students who may be returning to education and emphasise study skills. Most *Access to HE* Diplomas can be completed in a year or less. One-year courses typically require study of up to 16 hours a week in college, as well as doing a certain amount of private study outside classes. Most courses are also offered on a two-year part-time basis. Access courses fall outside the financial support system for HE. Except for those who qualify for an Adult Learning Grant, students who need support may consider a Career Development Loan at commercial rates or need to explore charitable sources.

Courses are also provided in the evenings or by distance learning to accommodate those who are still at work or have family commitments. The

modular nature of the courses means that if circumstances change and a student needs to leave the course, credits are awarded for the work done to that point. This gives flexibility for students to be able to pick up where they left off at a later time and complete the course if they are able to.¹⁵

3. Foundation Degrees:

Introduced in September 2001, Foundation Degrees (FDs) are HE qualifications designed to equip learners with the knowledge and skills needed by employers and to offer career progression. They contain a mixture of academic and work-based learning. FDs take two years' study but may take longer.

There are now 2,500 different FD courses (with 800 more in development) and by 2008 more than 70,000 students had enrolled. Foundation Degree Forward (FDF), the body set up to coordinate activity and innovation on FDs, estimates that by 2010, 100,000 FD enrolments will take place. 14,975 students were awarded a FD in 2007/08 compared to 11,635 in 2006/07.¹⁶ In 2008 55% of foundation degree students were "mature" in age. Fifty seven percent were females.¹⁷

FDs are designed to enable employees, often with limited experience of HE, to start a flexible programme of learning while remaining at work. The degree is designed to address industry or employer-specific needs, as well as those of the learner, within a wider academic framework. They are accredited by a HEI and can run part or

¹⁴ APL - Accreditation of Prior Learning (APL) is a method laid down by the Quality Assurance Agency for Higher Education to gain recognition of learning or qualifications prior to starting the course. Accreditation of Prior end Experiential Learning (APEL) recognises experience that proves an applicant has certain knowledge or skills. As part of the APL/APEL process a portfolio of evidence is submitted showing how prior learning or experience relates to the parts of the course for which the applicant is hoping to get exemption. <http://www.qaa.ac.uk/academicinfrastructure/apl/default.asp>

¹⁵

<http://www.accesstohe.ac.uk/home/explanation.asp#p6>

¹⁶ First Statistical Release 2009 HESA - <http://www.hesa.ac.uk/index.php/content/view/full/1356/61/>

¹⁷ "The Future of Higher Education" – Derek Longhurst – FDF News Issue 17 March 2009 – www.fdf.ac.uk

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full-time (often over two years) resulting in a level 4 qualification.

Central to the concept is that learning will also take place in the workplace through practical projects to a required standard. Conversion to a standard honours degree programme is possible. A recent report by the FDF indicated that improvements were needed to the scheme in terms of raising awareness, the quality of interaction between employers and providers and the support given to FD students.¹⁸ The FDF has since published a training guide to those providing Information Advice and Guidance (IAG) to prospective students¹⁹. The FDF has also developed a service, Employer-Based Training Accreditation, to enable employers to get the training they provide in house to be recognised by HEIs for credits and / or awards²⁰.

However problems have been identified. Commenting on the experience with FDs, the TUC notes that, "in only five percent of cases do employers meet the tuition fee costs of full-time Foundation Degree students and in only 22 percent of cases do employers meet the costs of part-time students."²¹ FD students can also apply for a student grant and loan as any undergraduate would.²²

¹⁸ The Impact of Foundation Degrees on the Workplace and Students – A Summary of Research Projects Commissioned by FDF http://www.fdf.ac.uk/files/fdf_research_summary.pdf

¹⁹ www.fdf.ac.uk/home/information_for_universities_and_colleges/iag_training_materials

²⁰ http://www.fdf.ac.uk/home/information_for_employers/employer_based_training_accreditation_ebta/

²¹ See *Higher Education at Work* TUC consultation document June 2008 <http://www.unionlearn.org.uk/policy/learn-2285-f0.cfm>

²² See "Financial Support for Part Time Students in Higher Education" - DIUS http://www.direct.gov.uk/en/EducationAndLearning/UniversityAndHigherEducation/StudentFinance/Applyfortheirstime/DG_171529

Government Response

The Government responded to the Leitch report by accepting the need for new bodies, setting up a Commission for Employment and Skills in 2008, and outlining its plans for a "skills revolution" which would close the skills gap at all levels, right across the nation, by 2020²³. Its demand-led approach would put customers, adult learners and employers first. It affirmed the targets set out in the Leitch report to achieve by 2020:

- 95 per cent of adults to have the basic skills of functional literacy and numeracy, up from 85 per cent literacy and 79 per cent numeracy in 2005;
- More than 90 per cent of adults to have gained at least a level 2 qualification (equivalent to 5 GCSEs at A*-C grade), up from 69 per cent in 2005; with a commitment to achieve 95 per cent as soon as possible;
- to shift the balance of intermediate skills from level 2 to level 3 (equivalent to 2 A levels), with 1.9 million more people achieving level 3 by 2020;
- to deliver England's share of the UK ambition to have 500,000 people a year in Apprenticeships; and
- More than 40 per cent of all adults to have a HE qualification (at level 4 and above) up from 29 per cent in 2005; with a commitment to achieving world-class levels.

The Government has since published in 2008 its consultation document, *Higher Education at Work*²⁴, which sets out ideas for achieving the Leitch proposals in the HE field. It also proposes even higher targets:

"... we must commit now to exceeding 40% of the population aged 19 to State Pension age qualified to Level 4 or above by 2020. .. At present we are

²³ World Class Skills: Implementing the Leitch Review of Skills in England DIUS 2007 <http://www.dcsf.gov.uk/skillsstrategy/uploads/documents/World%20Class%20Skills%20FINAL.pdf>
²⁴ http://www.dius.gov.uk/consunionlearntations/~media/publications/Higher_Education_at_Work

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at 31%, an increase on the 29% reported in Leitch for 2005. But the milestones express only part of our ambition. Japan, Canada, the Russian Federation, Israel and the US are at 40% or more already...”

Towards the Leitch Targets: among the changes implemented and proposed in 2009 will be the introduction of:

- **Skills Accounts**²⁵;
- the employers' **Skills Pledge**;
- Continued development of **two-year full time degrees**;
- The creation of a “**seamless service**” for adults involving Skills Accounts, Jobcentre Plus and the new adult careers advisory service. These organisations are coming together to provide a combination of skills assessments, advice and guidance on courses and on the financial costs involved in each option;
- **An extension of the Train to Gain** programme of employer support to encompass both level 3 and level 4 courses of learning and training – within limits set by the Sector Skills Councils' criteria covering the activity of the employer.

Part-Time Study – the Cinderella of HE

According to a very recent report commissioned by the Department for Innovation, Universities and Skills (DIUS) much more still needs to be done to attract learners into HE while they are still at work via the part-time route:

“The development of a highly skilled workforce in this dynamic environment will require ‘part-time’ mode in order to combine study with changing work,

²⁵ When they open a Skills Account, individuals will be able to access the full range of adult information, advice and guidance services in the new universal adult careers service. They will also receive an account number and account card, which will help people to understand the levels of investment going into their training, whether it's coming from them, their employer or the state.” World Class Skills: DIUS 2007

lifestyle and family commitments. In fact, according to HEPI Leitch's 40% target can only be reached if participation by part-time and mature students in employment increases significantly.”²⁶

The report points out that some 40% of HE students in the UK currently study on an accredited part-time basis. Increasing numbers of students are engaging in short, non-accredited courses. While all universities have some part-time provision, 77% of the part-time population is concentrated into just 60 institutions including the Open University, which is the largest single deliverer of part-time HE in the UK.

The report indicates that there is still a long way to go for HE providers, employers and government before part-time HE students can look forward to a “fair” deal and make the contribution that society badly needs them to make. Professor King, the report's author, suggests that a number of changes are needed including:

- The elimination of the increasingly indefensible division between part-time study and full-time study in terms of regulatory, funding and student support frameworks;
- An alternative model to the traditional academic calendar to allow year-round enrolment and access to facilities so that learners are not confined to artificially imposed times of the year or even times of the day;
- A system of transferable credit-based learning and credit-based funding which recognises achievement irrespective of mode, type and place of study;
- The ability for students to enter and re-enter HE and gain credit for the study they have undertaken. This

²⁶ *Part Time Study in Higher Education* Professor Christine King - A report commissioned by John Denham, Secretary of State for Innovation, Universities and Skills 2008
http://www.dius.gov.uk/higher_education/shape_and_structure/he_debate/part_time_studies

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will reward personal commitment and aid retention;

- A research, practice-based curriculum with increasing flexibility in delivery using a variety of types of engagement – mobile communications, web-based, blended learning , face-to-face, on campus, in the workplace, in HE centres and FE colleges;
- A flexible HE workforce that can support diverse patterns of student engagement and enhance staff scholarship, research and practice-based learning; and
- A uniform system of financial support for all students regardless of mode.

Latest Developments: The Economic Downturn

The full impact of the current economic downturn on the Government's ambitions to increase the level of learning and skills among the working population has yet to emerge. The impact will be felt primarily by people who have been made redundant – which, conversely, have lead to an increase in the number of adult applicants. It will also be felt by people in work whose pay and conditions are stagnating or reducing. The indications are that employer support for training will be a primary casualty of the recession. It will also be felt by providers of HE who may have to turn away applicants because of changes to Government spending plans²⁷ and by students who may not gain the place to study they hoped for because the student loans system is under pressure from the credit squeeze.

In March 2009 the government announced a new £350m package of support²⁸ for Small and Medium-Sized Enterprises (SMEs) alongside other support previously announced to mitigate the effects of the

credit squeeze. Ministers see no fundamental reason to question the rationale of expanding opportunities for HE as a central part of the strategy for improving individual life chances and the wider economic and social benefits that are thereby gained²⁹.

The Regional Context: the East Midlands Picture

In the East Midlands work has begun on the changes John Denham has indicated are needed - changes to the support learners on the cusp of higher level learning are offered and to the type and quality of learning they undertake once they enter HE.

Some of those changes are very recent. Some are innovative. Some have involved *unionlearn* in terms of design or delivery. There is plenty of evidence to show that further change and improvement is needed if the Governments targets are to be achieved in this region.

The East Midlands lags behind the UK as a whole and behind most other regions as far as learning and training is concerned. The latest available research shows that the challenges are significant:

- The East Midlands was placed 7th out of 9 regions in the England in terms of the participation by people of working age in job-related training;
- In 2006, around a quarter (25.9%) of jobs in the East Midlands required a level 4 qualification (or above) for entry;
- The East Midlands has a slightly lower proportion of people with level 4 or above qualifications than the UK as a whole – 29.6% as opposed to 32.8%. But demand for these qualifications is also comparatively low in the region;

²⁷ “University squeeze means 30,000 students could miss out on courses” Anthea Lipsett and Polly Curtis The Guardian, Friday 24 April 2009

²⁸http://www.dius.gov.uk/about_DIUS/what_we_do/business_gateway/help_for_smes

²⁹ Speech by John Denham, Secretary of State to HEFCE Conference 02/04/09 http://www.dius.gov.uk/news_and_speeches/speeches/john_denham/hefce2

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- In 2006/07, adult participation in FE was severely affected by the overall drop in adult participation in learning. The region recorded the highest reduction in the country (-35%).
- The number of Apprenticeships declined in 2005/06 and this trend continued in 2006/07, falling short of planned figures by 15%. This was one of the lowest rates of increase in the country. The economic downturn is likely to reduce further the demand for apprenticeships and there is a risk that there will be an increase in the number of apprentices being made redundant³⁰

Challenging Attitudes to Training and Learning in the East Midlands

By and large attitudes towards training and learning among people in the East Midlands are not drastically different to other parts of the country; but nevertheless represent a challenge. The East Midlands Learning and Skills Council Regional Strategic Analysis 2008/09³¹ provides an insight into these views:

- **Training is not rated a priority part of a job:** 'good training provision' was ranked ninth out of fifteen job features in both the East Midlands and England as a whole. Nevertheless, it was rated as 'essential' by a fifth of job-holders in the East Midlands, about the same proportion of employees who worked elsewhere in the UK.
- **Demand for training among employees is low:** Six out of ten (59.5%) respondents in the East

Midlands who did not receive training also said that they 'did not want any training'. Furthermore, two-thirds (68.2%) regarded training as unnecessary;

- **Most did not see lack of training as an obstacle to improved work performance or career prospects:** Over three-quarters (76.8%) of respondents in the East Midlands who did not receive training did not think that this would harm them in keeping up with changes in the job, and did not think that it would hinder their career opportunities. This figure is similar to the English average;
- **Despite this many recognised that training had an impact:** For example, nine out of ten respondents in the East Midlands said that it had helped them to improve their work practices (88.7%); and that it had improved their skills (91.6%);
- **Demand is nonetheless present:** Overall, a quarter (25.9%) of respondents in the East Midlands registered a strong desire for future training. They were more optimistic than those living in England as a whole that they would get training in the future. Around a quarter (23.7%) 'strongly agreed' that they would get future training opportunities compared to less than a fifth (19.1%) of those living in England as a whole;
- **Some employers are seen as unwilling to provide training:** around a sixth (15.5%) of respondents said that their 'employer was not willing to provide additional training, even though I wanted it'.
- **Training mostly takes place because employers demand it:** When training is undertaken it is often at the behest of the employer. Whereas only two-fifths of trainee

³⁰ East Midlands Learning and Skills Council Regional Strategic Analysis 2008/09 Part 2: Adult Skills in the East Midlands
<http://www.lsc.gov.uk/regions/EastMidlands/Publications/Recommended/>

³¹ East Midlands Learning and Skills Council Regional Strategic Analysis 2008/09 Part 2
<http://www.lsc.gov.uk/regions/EastMidlands/Publications/Recommended/>

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respondents in the East Midlands claimed personal responsibility, around two-thirds claimed that training had been initiated by their employer. The pattern was very similar among men and women, although only a quarter of female part-time employees received training as a result of their own initiative;

- **On-the-job learning through experience and experimentation as well as learning from others is a significant learning route.**

Around a third (33.6%) of East Midlands' respondents strongly agreed that the job itself requires learning and just over a quarter (26.4%) strongly agreed that they are able to learn from work colleagues. There was also strong agreement that job-holders have a teaching role in helping others learn – nearly a third (31.1%) of East Midlands' respondents took such a view. The East Midlands results mirror those in England as a whole.

Faced with this broad picture the East Midlands Learning and Skills Council has set out its demand-led strategy for the region in the following terms:

“productivity, particularly in the East Midlands, depends on increasing the proportion of those with Level 3 and Level 4 qualifications. This implies that a focus is required to improve the accessibility and availability of foundation degrees and other Level 4 qualifications in key sectors to improve the development of the region's economy.”

As far as movement towards higher level learning is concerned the LSC's Strategic Plan for the East Midlands (See footnote 28) includes:

- 3.6 million more adult full Level 3 attainments (equivalent to 68 per cent of adults of working age qualified to this level)

- Over 40 per cent of the adult population qualified to Level 4 and above.

In the East Midlands certain sectors have been prioritised because of their importance in economic and employment terms for the region. Currently, the priority sectors are:

- Construction;
- Engineering; ,
- Health and Social Care;
- the Public Sector; and
- Retail is a priority sector in several local LSC areas.

The vehicles for delivery of the strategy in the East Midlands are:

Train to Gain

The East Midlands has been part of a pilot trialing access to Level 3 qualifications through Train to Gain as part of a cohesive employer offer. Take up has been slow among employers, with only 400 starts by 2007/08. There are very few achievements so far in the year 2007-8. Recent figures indicate that 43% of people get a promotion and 30% get a pay rise within a year of Train to Gain training.³²

The Skills Pledge

The Skills Pledge is a commitment that employers and organisations make to train and develop all their staff. It is delivered through Train to Gain skills brokers so that employers are made aware of the whole package of training and support that is available to them. The latest LSC report for 2007/08 shows that 460 employers in the East Midlands have signed the Skills Pledge, covering nearly 68,000 employees.

Adult Learning Grant

Applications for the Adult Learning Grant were well above anticipated levels, and by

³² John Denham MP, Secretary of State for Innovation, Universities and Skills. 2009 <http://www.foundation.org.uk/>

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July 2008, some 2,500 applications had been received in the East Midlands. Actual grants given out totaled 1,768, 68% above the anticipated number.

Adult Learning Accounts

Adult Learning Accounts aim to offer a personalised service that allows learners to access a range of information and careers advice about how to improve their skills and access financial support. Holders of an account will have access to careers advice services, a voucher indicating their eligibility for public funding for their chosen course, and a secure record of their learning to share with employers and others if they wish.

In 2007/08 the East Midlands region was one of the pilot areas for Adult Learning Accounts, along with the South East. The aim of the pilot was to stimulate demand for Level 3 learning among adults and to test the mechanism of an accounts system to provide funding to those who were eligible. The purpose of this was to increase participation in learning by increasing choice for the learner.

The East Midlands achieved the LSC's target for the pilot, with over 1,200 accounts opened in 2007/08. As part of the commitment to the pilot, funding will be continued for the learners who began their course under the scheme until they complete their learning. Lessons from the pilot have been fed into the national evaluation and will inform the development of a new national scheme of learning accounts.

Work-Based Learning

In the East Midlands SSCLLN have undertaken a broad range of work to develop work-based learning including:

- development of new courses such as Foundation Degrees in line with regional demand and priorities;
- adaptation of modules for courses and bridging courses to make them more

accessible for vocational learners and learners already in employment;

- development of tailored solutions to education and training needs;
- development of Progression Agreements between colleges and universities;
- mapping Information, Advice and Guidance arrangements for learners to pinpoint and address any gaps.

SSCLLN's latest newsletter reports on a progression agreement between Leicester College and De Montfort University signed in late 2008, covering additional programmes in nursing and midwifery.³³

University of Derby³⁴ and the University of Northampton support Learndirect's "Learning Through Work" scheme³⁵.

Derby University offer several different kinds of cohort, or group learning, usually towards smaller, minor awards rather than intermediate or major awards. *unionlearn* in the Midlands is currently supporting a cohort of work-based learners on an access course at the University of Derby which incorporates elements of the work-based learning programme (see page 30).

At the University of Northampton a similar scheme is running in a limited number of science-based areas linked to FDs. The School of Applied Sciences Division of Engineering is continuing its development of a part-time FDS for mature students employed in the High Performance

³³ For latest details see

<http://www.le.ac.uk/ssclln/documents/News%20and%20Events/Newsletter%20Winter09.pdf>

³⁴ At the University of Derby an adapted model of the Learndirect framework, called Learning Through Work has been developed to offer flexible, work-based routes to HE qualifications. It includes APL (accreditation of prior learning) to enable learners to build upon existing, recent and relevant certificated and / or experiential learning. Individual learners are supported in developing a learning contract using online resources and tutorial support.

³⁵ <http://www.learningthroughwork.org/faqs/>

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Engineering (HPE) Industries.³⁶ It is currently not available to learners pursuing individual learning paths.

Foundation Degrees in the East Midlands

In 2008/09 some 264 different courses were on offer as FDs throughout the East Midlands through 32 different FEIs and HEIs, including eight universities, a HE college, 22 FE colleges and the Open University.³⁷

In the East Midlands 6,152 students enrolled on FDs in the academic year 2008-09 - a figure representing an increase of 20% on the previous year - just below the average for English regions. The table below gives the breakdown by region. Fifty nine percent of FD students in the East Midlands were studying full time.³⁸

Region	Total number of Foundation degree students in 2008-09	% increase on 2007-08
West Midlands	9,003	33%
London	11,670	21%
Open University	3,791	33%
North West	12,168	20%
East Midlands	6,152	20%
South East	10,257	20%
South West	11,843	19%
Yorkshire and Humber	9,821	19%
North East	6,947	19%
East of England	5,687	16%
All English Regions	87339	21.0%

³⁶<http://www.learningthroughwork.org/universities/#northampton>

³⁷http://www.emfec.co.uk/uploads/Foundation_Design_08.pdf

³⁸ "The Future of Higher Education" – Derek Longhurst – FDF News Issue 17 March 2009 – www.fdf.ac.uk

Summary

The National Context

- Over the last 40 years several avenues have been introduced to enable those without formal qualifications to progress to higher education: the Open University, *Access to Higher Education* courses and since September 2001 Foundation Degrees enable learners, often with limited experience of Higher Education, to start a flexible programme of learning while remaining at work;
- Despite these developments, the Government's 2003 White Paper, *The Future of Higher Education* set out the need for Higher Education Institutions to widen participation in higher education and to offer flexible forms of education for people at work;
- The Leitch report of 2006 showed that the skills base of the UK remains weak by international standards, holding back productivity, growth and social justice;
- Leitch proposed a target of more than 40 per cent of all adults to have a Higher Education qualification (at level 4 and above) by 2020 – a target which was accepted by the government;
- Leitch proposed a "demand-led" system to be set up for all publicly-funded, adult vocational skills;
- Employers have identified that they want workers who have good skills in team-working and communication, as well as good skills for life such as English and maths. They support the need for formal qualifications in management and leadership skills and in business improvement techniques

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to drive up productivity and sustainability

- A number of recent initiatives have been taken to increase the take-up of HE by people at work, including HEFCE's Strategic Development Fund. This has enabled LLNs to develop projects to expand the pathways into HE. Despite this Government and Higher Education Institutions have been criticised for failing to improve the "offer" to adults and part time students;
- The economic downturn is likely to impact on Government plans and targets for the expansion of numbers in Higher Education. , Conversely, this has resulted in an increase in applications from adults.

The East Midlands Context

- The East Midlands lags behind the UK as a whole and most other regions as far as learning and training is concerned;
 - The region was placed 7th out of 9 regions in the England in terms of the participation of people of working age in job-related training;
 - In 2006, around a quarter (25.9%) of the jobs in the East Midlands required a level 4 qualification (or above) for entry;
 - The East Midlands has a slightly lower proportion of people with level 4 qualifications (or above) than the UK as a whole – 29.6% as opposed to 32.8%. But the demand for these qualifications is also comparatively low in the region;
 - In 2006/07, adult participation in Further Education was severely affected by the overall drop in adult participation in learning. The region recorded the highest reduction in the country (-35%);
- The East Midlands Learning and Skills Council has set out its demand-led strategy and recognised that productivity, particularly in the East Midlands, depends on increasing the proportion of those with Level 3 and Level 4 qualifications;
 - The LSC recognise that attitudes towards training and learning among people in the East Midlands represent a challenge. They are using a variety of vehicles to overcome this including Train to Gain, The Skills Pledge , Adult Learning Grants, and Learning Accounts;
 - Work-Based Learning has been developed with the support of the LLNs across the region to offer flexible, work-based routes to HE qualifications;
 - In 2008/09 there were 264 different Foundation Degree courses in the region, with 6152 students enrolled.

5: How Have Unions Responded? – The National Picture

In broad terms the TUC and its skills and education arm, *unionlearn*, have welcomed the findings, targets and recommendations of the Leitch Report and the Government's intentions set out in its *Higher Education at Work* proposals.³⁹ However the TUC is skeptical that the "post-voluntaristic" approach advocated by Leitch will lead to the necessary investment in skills by employers. The TUC contends that unless the Government uses other more forceful and legally-based measures, the actions are unlikely to overcome employer resistance and will not address the great training gap between the few employees who receive sufficient training and the many who receive far less⁴⁰.

As early as 2006 *unionlearn* had embarked on a programme of support for unions and union learners starting on a pathway to higher level learning. Shortly after the Leitch report was published, the *Trade Unions Aim Higher* project was launched. This aimed to build on the experience of the first 10 years of the Union Learning Fund (ULF) and the strategic partnership approach that had seen demand-led union learning expand significantly.

Union Demand for Higher Learning

The research commissioned to underpin the *Trade Unions Aim Higher* project showed that many union members are already highly qualified and many want to continue learning:

- More than 40 per cent had a Level 3 qualification and nearly 30 per cent

- were already educated to at least first degree level;
- Only 14 per cent of union members felt that they had completed their educational development;
- 41 per cent were already engaged in further education, training and development, and more than two thirds of union members were planning to undertake such learning in the next 12 months; and
- 71 per cent were hoping to undertake further education, training and development in the next five years and 31 per cent in the next 10 years.

The same survey found significant latent demand for such learning.⁴¹

However the survey also revealed substantial barriers in terms of time and money to accessing provision:

- Almost six out of ten (59 per cent) respondents said that they would find it difficult to get paid time off work to study;
- Just under a half (47 per cent) felt that they could not afford the fees;
- Peer group and union support, as well employers providing paid time off and helping with study costs, would also help motivate learning; and
- Whereas four in five respondents experienced sessions in large groups, less than one in ten preferred this method. This indicates a significant mismatch between

³⁹ See footnote 9

⁴⁰ "Managers get three times as many training days as non-managers, and particular group of workers are also less likely to be offered training – older staff, part-time workers, and certain black and minority ethnic groups" – see footnote 9.

⁴¹ Almost all the respondents (96 per cent) either strongly agreed or agreed that it is important to always be learning. The reasons for wanting to take up learning were diverse, with a higher proportion wanting to study for their personal development or leisure (81 per cent) than those thinking that gaining educational qualifications would benefit them in their work (56 per cent).

Learning Unlimited: A survey of union members and higher education opportunities, TUC 2007 <http://www.unionlearn.org.uk/files/publications/documents/114.pdf>

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demand and supply with regard to learning methods.

Finally, the survey gained insight into what would help union learners respond to higher learning initiatives:

- Almost a half (47 per cent) would be interested to learn if supported by a colleague or a union rep trained to advise on learning; and
- The most preferred method of delivery was sessions in small groups (50 per cent) followed by a combination of different methods – i.e. blended learning (22 per cent).

In order to meet this potential demand, *unionlearn* concluded that:

- There should be more incentives for employers to provide paid time off to learn and they should contribute to fees;
- There should be rights for unions to negotiate such opportunities;
- Much more flexibility in the delivery of provision is required, customised to the needs of the adult learner⁴²;
- ULRs can play and are playing an important part in helping and supporting members to access HE.

Through the *Trade Unions Aim Higher* project, individual unions have demonstrated ways in which these aims can be met. With funding from the Higher Education Funding Council for England (HEFCE), it brought together *unionlearn*, (the *Aim Higher* project, the Open University (OU) and Birkbeck College to develop tools, partnership approaches and pathways for union members to access HE. The project promoted short courses in the workplace, and provided financial support for learners in three regions of the TUC (the North West, Northern and South West Regions) two unions (the commercial and public service unions PCS and Prospect) and within the

⁴² e.g. venue and course time flexibility, study skills support, Accreditation of Prior Experiential Learning, blended learning; recognition of the role of the ULR in supporting learners.

TUC (as an employing organisation), pilot projects have been launched and evaluated.

Union Initiatives on Higher Learning

- **Open University (OU):** When it was launched in 2007 the shared objective of the *unionlearn* partnership with the OU (as set out in the memorandum of understanding) was to encourage 4,000 union members to take a wide range of OU courses each year. Union learners can claim a 10 per cent discount on fees for their first undergraduate course at level 1 HE that carries 30 and 60 credit points towards their qualification. A common pathway into the OU programme is via “Openings”. This 10-credit, 20-week course does not require any existing, formal qualifications. It takes place in three face-to-face group sessions in the workplace, during work time, and counts towards other qualifications which may be taken. This OU link is built strongly into other areas of joint action set out below - Union Learning Clubs (ULCs) and with three unions – PCS, public service union Unison and Prospect.
- **Union Learning Clubs (ULCs):** ULCs bring workplace learners together to share information about courses, encourage each other and, if learners want this, receive guidance from a university tutor on the skills that will help them to succeed in HE. The Greater Manchester ULC (GMULC) was launched in 2006 and is aimed at adults in the workplace who do not have a previous HE level qualification. By 2008, 115 learners had participated in the GMULC project, mainly on OU courses enjoying a 50 per cent discount on the first 60 credits of an access course. Fifteen per cent of learners completing an OU course then

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progressed onto another OU course⁴³. Appendix 2 provides a summary of the leaflet, *What Is a Union Learning Club?*, used to promote the GMULC. In addition, *unionlearn* in the North West produced a 38-page booklet aimed at ULRs giving region-specific information and guidance for workplace learners⁴⁴

- **Climbing Frame:** This online tool, to be launched in late 2009, will be used by ULRs to track and manage contact with learners and their progression, and will also include a HE theme to offer general guidance for all potential higher level learners. It includes internet links to all the

⁴³ The GMULC model includes several vital features:

- A menu of accredited courses which includes OU Openings courses (10 credit, 20-week courses are designed for learners new to HE) and OU short courses (10 credit, 10-12 weeks) covering interest-based subjects in the Arts, Science and Technology;
- A subsidy of 50 per cent discount on courses that are typically £100-115 full price;
- Learner and study skills support via a ULC: a workplace group of GMULC learners on the same or similar courses are offered assistance by OU associate lecturers with non-course related support, such as study skills; and
- A *unionlearn* project worker funded to support the project and promote the learning offer to ULRs from a wide range of unions and in a large number of workplaces throughout the Greater Manchester area.

An evaluation showed the value of having dedicated and locally-based staff resources at the OU regional centre that can support collaborative work with unions and ULRs. The main barriers to HE learning identified by learners were lack of knowledge of the HE sector, a lack of confidence in their own ability, costs and time. Learners new to HE commented on the value of the additional support, via phone and internet, from the OU tutors.

⁴⁴ *Reaching New Heights – A Higher Education Handbook for Union Learning Representatives unionlearn* and *Aim Higher Greater Manchester* 2008; contact pbury@tuc.org.uk

relevant sources of information. Several unions are working on dedicated versions of the Climbing Frame for use by their ULRs⁴⁵

- **A *unionlearn* Higher Level Toolkit, Supporting Members in Higher Level Learning**⁴⁶ was launched in 2009. It summarises TUC initiatives and agreements, and draws on the experience of the *Aim Higher* project in the North West to provide a step-by-step guide for ULRs supporting higher level learners and exploring the issues with members, employers and providers.

A two-day training workshop for ULRs, based on the Toolkit, will be in the TUC regional programme from September 2009.

- **Access courses:** Within the *Trade Unions Aim Higher* project, contacts were established with a number of HEIs that had experience of offering courses to mature and returning students. For example, the University of Bolton offers an *Access to Business* course of one semester, and one-year programmes in Psychology, Mathematics and Art and Design. In addition, it is developing level 3 access courses which incorporate skills assessment and recognition of prior skills for those without qualifications. A variation on the access course in Leadership and Management has been developed for the Fire Brigades Union (FBU) in the North West.
- **Helping for ULRs Gain the NVQ in Information, Advice and Guidance (IAG):** The TUC

⁴⁵ *Climbing Frame* information leaflet (pdf 366kb) <http://www.unionlearn.org.uk/files/publications/documents/109.pdf>

⁴⁶ <http://www.unionlearn.org.uk/files/publications/documents/145.pdf>

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Northern Region has developed a programme of support to help ULRs gain the NVQ in IAG since 2007 while concurrently supporting union learning centres to gain the Matrix standard for Information Advice and Guidance. The programme involves partnerships with consortia of education institutions in the region that offer financial support for the release and training costs of ULRs to gain the NVQ in IAG at levels 3 and 4. The level 4 qualification is particularly aimed at experienced ULRs who operate in the region's 15 workplace learning centres that have acquired the Matrix standard for the delivery of Information, Advice and Guidance. The region reported in late 2008 that over 100 ULRs have been trained in the IAG – 75 at level 3 and 25 at Level 4. It was recruiting for the third cohort of students for 2009 with a target of 100 Level 3 and 50 at Level 4. The Northern Region's aim is to have at least 25% of ULRs trained in IAG by 2010. *unionlearn* in the Northern Region has published two leaflets to promote the programme: *Higher Skills* and *ULR: IAG – Information Advice and Guidance*.

▪ **Union-Specific Initiatives:**

- Unison has developed the OU's "Openings" programme around ten core 20-week courses in the areas most demanded by Unison members⁴⁷. Each course also focuses on common components like study skills. The programme is based on agreements with employers that allow three face-to-face group sessions with fellow students and the OU tutor to take place during working time. In addition

students do eight hours study each week in their own time.

- In the North East, *unionlearn* had supported Unison's, *Bridges to Learning* project with finance from its regional *Learning for All Fund*. This project developed working links with the OU in the North East and focused on building progression routes for workers in the health and social care sectors.
- In the Yorkshire and Humberside region, the OU regional centre is also working with unions to develop access to courses for manual workers.
- In Northern Ireland, UNISON, the OU, health sector employers and the Northern Ireland Congress of Trade Unions (NICTU) developed joint work to support health care workers to access the K100 programme (*Understanding health and social care*), a potential route into nursing.
- PCS and Prospect have worked closely with the OU to give learners "taster" experience of HE by accessing OU short and Openings courses. The PCS pilot worked with ULRs in the Department of Work and Pensions (DWP), the Child Support Agency and Job Centre Plus in Merseyside. The Prospect pilot focused on the nuclear sector, which is experiencing significant organisational change and, in particular, on nuclear decommissioning. The project worked with ULRs at both the Sellafield and Risley plants of the BNFL Group.

▪ **Using the Union Learning Fund (ULF)**

The ULF supports capacity building within unions to support member access to learning and skills. In

⁴⁷ *Starting with Psychology, Understanding Children, Understanding Management, Starting with Law, Understanding Health, Starting with Maths, Making Sense of the Arts, Understanding Society, Introducing Environment, and Learning to Change.*

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2006/7, over 9000 members took part in Continuing Professional Development /level 4 programmes with the support of the ULF. The proportion of ULF-supported learners accessing these courses is rising. There was an increase of 10 per cent in the number of the CPD/level 4 learners taking part in ULF projects between 2006 and 2007.

unionlearn Strategy

The experience gained by *unionlearn* and unions was reviewed in the late 2007⁴⁸. The review identifies much that is positive in the experience (including the signing of Memoranda of Understandings with the Open University and Foundation Degree Forward (the national body set up to promote and coordinate the FD programme) and partnership working with the *Aim Higher* project and unions) but it also identifies the need to build on the achievements.

It concludes:

“...the picture is complex; there are a variety of learner needs, union focus on higher learning is varied, HEI experience of (and offer for) working adult learners is variable and the policy context is changing. There is a need, therefore, to further develop models of joint working and a stronger *unionlearn* strategy for higher level learning. This will help focus *unionlearn* activity where it is most needed and add value to the work of others.”

It pinpoints eleven actions on which it will continue to work (see Appendix 2 for this list).

One such action has been the launch in 2007 of the *unionlearn* Learning and Careers Service in conjunction with the Government service (See Appendix 3). This includes:

- An online course directory for learners;
- An online job profile search facility;
- Free expert advice on learning and career options on a Freephone number (08000 92 91 90); and
- An online funding Directory.

Finally the report also highlights the three major issues faced by unions and *unionlearn* in developing support for higher level learning:

- the level of funding and resources to develop joint activity with the HE sector;
- the limited experience of unions in working with the HE sector outside of union's specialist education teams; and
- The lack of a co-coordinated strategy or structures within *unionlearn* to take the work forward.

⁴⁸ *Developing pathways to higher level learning for union learners* TUC 2007
<http://www.unionlearn.org.uk/publications/index.cfm?frmPubID=109>

6: Union initiatives to support higher learning in the East Midlands

Information, Advice and Guidance (IAG) Training for Union Learning Representatives (ULRs)

In 2006, unionlearn in the Midlands gained external funding to support the training and achievement of the NVQ in Information, Advice and Guidance (IAG) at level 3 for a cohort of students in the Lincolnshire area. Although monitoring of the progress of the ULRs on this project became problematic when the funding came to an end, the aim was for 20 ULRs to achieve the level 3 qualification.

A similar regional *unionlearn* project was launched in the West Midlands in 2007. So far it has recruited 24 ULRs to a customized and ULR-relevant Level 3 IAG programme offered through Stoke on Trent and Stourbridge Colleges.

In 2009 the public and commercial services union PCS, with the backing of *unionlearn* made arrangements to support a cohort of 12 ULRs to achieve a re-modeled version of the NVQ in IAG through Leicester College. This is being offered at levels 2 and 3. The remodeled version will reflect the role of the ULR. The evidence for learning acquired and skills demonstrated will be appropriate to the ULR's "voluntary" role. The programme will be backed by a three-day taught course and the learners are expected to achieve the qualification over period of six to eight months.

Union Learners with the Open University (OU) in the East Midlands

Since 2007, public services union Unison has offered its members funding to begin the OU's Openings course. In November 2008, the OU set up a national tracking facility on its register of students on this programme. Out the 730 Unison members currently registered, 113 lived in the East Midlands

area. They had signed on to a variety of course programmes, as Table 6.1 shows: Table 6.1 OU courses Unison members in the East Midlands are registered on

Y163 Starting with psychology	36
Y156 Understanding children	21
Y159 Understanding management	15
Y166 Starting with law	10
Y158 Understanding health	8
Y162 Starting with maths	8
Y160 Making sense of the arts	6
Y157 Understanding society	5
Y161 Introducing environment	2
Y165 Learning to change	2

Support for Level 3 Unions Brokering Management Skills

In 2007 *unionlearn* in the Midlands successfully secured funding from the East Midlands Development Agency (EMDA) to pilot a unique project to broker the take up of management skills training via *unionlearn* and TUC affiliated unions in the region. The rationale for the programme lay in the proven lack of employees with suitable management skills across the region.⁴⁹ The workplaces targeted reflected the regional strategic sectors. The programme promoted separate modules within the programme offered by the Institute of Leadership and Management (ILM) to union members and other workers. . Central to the promotion and take up were the ULRs in the workplaces.

The "package" of learning opportunities offered comprised:

⁴⁹ A survey of employers in the East Midlands highlighted that two-thirds of managers lack the management skills required for them to carry out their jobs to their full potential, which was double the rate for the rest of the country.

Regional Economic Strategy for the East Midlands 2006-2020. East Midlands Development Agency 2006 <http://www.emda.org.uk/res/>

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- provision of one-day workshops on leadership, mentoring and coaching skills and effective communication skills in line with ILM awards to enable progression;
- provision of a three-day course leading to a level 3 ILM Award in Leadership;
- provision of a one-year ILM Management course for union project workers;
- a first step management training activity with women; and a focus on attracting employees from ethnic minority communities onto management skills training; and
- workshops on supporting apprentices which provide units from an ILM award on mentoring and coaching.
- workshops targeted at migrant workers with suitable level 2 skills

The outcomes from the first phase of the project showed that 36 Level 3 workshops and courses of varying length (up to three days) had been delivered with 738 attendees from 26 different unions. The Table below sets out the areas covered by the workshops and courses:

An independent evaluation of the project further identified that:

- An analysis of the evaluation forms from the workshops showed high levels of satisfaction with the training. In particular, 95% of participants agreed that the session was 'useful in developing my practice' and 95% agreed the exercises were 'useful and relevant to my development'.
- The evaluation showed that "partnerships with the main employers in the Derby area, namely Rolls Royce, (aero engine manufacturer) Bombardier, (railway engines) and Toyota, (car manufacturer) were further

Subjects covered by workshops and courses as part of the <i>Unions Brokering Management Skills</i> project	
Workshop/Course	Number of participants
Mentoring and Coaching - one day	462
Certificate in First Line Management	8
Full Award in First Line Management	80
Women Stepping up to Management - one day	78
Effective Communication Skills - one day	55
NLP (Neuro Linguistic Programming – Communications) - 3 days	15
Report Writing for Managers, Budgets for Managers NVQ level 3	5
Supporting Apprentices - one day	35
Black and Ethnic Minority (BME) learners accessing training	80
Non-union affiliated participants	100
Employed within regional "Key Sectors"	80

strengthened as a result of the workshops.... The workshops have clearly helped to stimulate and influence demand for management skills training within these key workplaces.... Additionally, the project has enabled 35 Skills for Care Ambassadors to access mentoring and coaching training. Skills for Care Ambassadors support the recruitment and retention of care staff in the East Midlands. Developing a lasting relationship between *unionlearn* and Skills for Care has been a key success for the project."

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Commenting on the *Women into Management* workshops, the evaluation report notes:

“The key challenge with this activity has been in working with employers to explain the potential benefits and combat those reticent to release staff not in management roles. ULRs have been instrumental in targeting women within workplaces to encourage them to participate.”

During the second phase of the programme in 2008, participants were offered a session with a Next Steps careers advisor.

A range of recommendations are made in the evaluation report in terms of improving the promotion, delivery and preparedness of similar projects in the future. It notes in particular:

“Future projects of this kind could consider how workshop participants can be followed-up. This could be via leaflets in the post or follow-up emails to encourage implementation of key learning points. Postal communication could also help participants sell the benefits to employers for future training opportunities”

In the continuing phase of the project from September 2008 to March 2009 a further 9 one day and three three-day courses were held involving 167 participants. A follow up evaluation of this phase shows that 80% of learners from the one-day workshops indicated an interest in obtaining a qualification in management.

Derby University: work-based learning:

In 2007 *unionlearn* in the Midlands began work with Leap Ahead, the Lifelong Learning Network covering Nottinghamshire and Derbyshire, to develop a project aimed at bridging the gap in progression from level 3 to level 4. The award, made by the University of Derby, aimed to build on the university's experience of running the LearnDirect *Learning Through Work* programme. This comprises a 60-credit

award at level 3/level 4 made up from a combination of:

- learning that has taken place in the workplace, which could lend itself to accreditation by a Higher Education Institution (HEI);
- additional bridging modules focusing on the development of study skills to manage the demands of higher level learning; and
- some vocational modules at level 4.

Across its Network, Leap Ahead also committed itself to develop a new curriculum, or enhance existing provision with new, bite-sized, modular learning to add to the suite of provision from which learners working towards the Lifelong Learning Award could accumulate credit.

To date one major cohort of 10 union learners from three different rail industry unions employed throughout East Midlands Trains' national operation have started the programme. The company has agreed to cover all the fees, but with the proviso that students have to repay the fee to the company if they withdraw or fail to achieve.

The university offers tutor contact by phone and email and up to four tutorials per year. The inclusion in the cohort of the lead ULR in the company will enable *unionlearn* in the Midlands to review the lessons learnt from this pilot and draw best practice into its approach towards higher level learning.

Initial indications show that a high level of face-to-face contact is needed by learners broaching this level, often for the first time in their lives. This support could be underpinned by appropriately trained ULRs to provide a regular “How's it going? - Any problems?” check with learners, encouragement and feedback to the tutor where appropriate. The necessary protocols with the university and employer need to reflect this potential ULR role.

7: Findings of the *unionlearn* Investigation in the East Midlands

A). Learners' Survey: Interest in Higher Level Learning Among Workers in the East Midlands

Distribution and Response

unionlearn carried out a questionnaire-based survey of workers in the East Midlands through the network of Union Learning Representatives (ULRs) within TUC-affiliated unions over the course of three months from December 2008 to February 2009. The questionnaire (see Appendix 5) was distributed in both paper and email format. Over 700 questionnaires were distributed directly to ULRs whose details are stored on the *unionlearn* database. Some ULRs then copied and further distributed the questionnaire among union members at their workplace. Others were distributed via union regional offices. Distribution also took place via the organisations linked to the Public Sector Compacts (liaison bodies for public sector employers) within the East Midlands.

Because of the distribution method, which was partly carried out by third parties, it was not possible to gain a record of the total number distributed. However an estimated 1500 were initially distributed to known recipients.

All questionnaires were returned to the *unionlearn* in the Midlands regional office in Birmingham. A total of 84 returns were received,

Profile of Respondents

The table which follows provides a summary of the key points showing the profile of the survey respondents. The major points to emerge are that a majority of the respondents were:

- Female (over two thirds)

- White ethnic background (nearly four fifths)
- In "white collar occupations" (two thirds)
- Earned less than £20000 per year (nearly two thirds – 30% earned less than £16000)
- Had less than ten years service (nearly two thirds)

Profile of Respondents	
Profile Criteria	Breakdown within Responses
Gender	68% female / 31% male
Age	69% aged 40+ / 30% aged under 40
Ethnic Background	78% white / 6% black / 8.3% Asian
Job / Profession	30% Professional / Technical :
	22% Clerical / Secretarial:
	15% Manager / Administrator:
	4% Plant / Machine Operative:
Jobs by Sector	46 % worked for local government
	12 % worked in manufacturing
	11% worked in the health services
	9% worked in private services
	4% worked in national government
Pay	63% earned less than £20,000
	9.5% earned £20,000 - £29,999
	14% earned more than £30,000
Work Patterns	22% worked part time
	26% worked unsocial hours or shifts
Length of Service with current employer	38% had worked for five years or less
	27% had worked for six to ten years
	34% had more than ten years' service

Union Membership and Contact with ULRs:

Over 90% of the respondents were in a union. In total six unions were represented in this sample of members; the general GMB union, the public and commercial services union, PCS, the construction union, UCATT, the public services union, Unison, the general Unite union and the shop workers' union USDAW.

Over 60% of the responses were from Unison members. This may be explained by

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factors to do with motivation and familiarity among Unison members with the idea of higher level learning - coupled with their existing Unison activity. Unison has an existing, successful programme of courses enabling members to access higher education via the Open University.

Union Membership	As percentage of total responses
GMB	5.3
PCS	3.9
UCATT	1.3
Unison	60.5
Unite	21.1
USDAW	1.3
Total in union membership	90.5
Not in Union	8.3
Not Shown on response	1.2

When asked if they were able to contact a ULR at their workplace 50% stated that they were, 22% stated they were not, and 26% stated they were not sure.

Learning Achievements

Compared to the profile of the respondents to the *unionlearn* national survey (see footnote 39, page 22), the educational achievements of members responding to the East Midlands survey were generally lower. They included 25% whose highest qualification was level 2 (compared to 22% in national survey).

Nearly 40% of the respondents stated that they had gained qualifications at level 3 (compared to 42% in the national survey) and over a quarter had achieved a level 4 qualification or above (compared to 29% in national survey).

Highest Learning Achievement by Respondents	
Level	As percentage of total
level 1 or below	1.2
1	1.2
2	25.0
3	36.9
4 or above	26.2
Not sure	2.4
Not Shown in response	7.1

Learning Opportunities at Work

- Over half of the respondents stated that their employer provided some form of learning or training opportunities at work or via work.
- Nearly 40% stated that they were able to take advantage of those opportunities.
- One third stated that they had undertaken some form of learning or training at work in the last five years and were able to cite the types of courses they had taken.
- However only just over one quarter stated that they had been provided with release from work to do that training and only a further 7% had been offered some other form of support from the employer.

Learners Looking for Opportunities

The respondents to the questionnaire were generally highly motivated about further learning and training opportunities:

- 77% of those stated that they wished to undertake some form of further training or learning.
- 18% said they would like this learning to be work related, 36% said they would like this learning to be leisure, and 30% stated a desire for both work and leisure-related learning.
- Over 60% stated that they had identified a course of learning they wished to undertake. 44% stated that

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they wished to undertake a course of higher level learning.

Barriers to Learning Identified

A large number of respondents identified one or more barriers they perceived would prevent or make undertaking further learning or training more difficult. Chief among those barriers identified were concerns about maintaining income and meeting the fees during the period of learning (60%). At almost the same level at 59% were concerns about being able to carry out a course of learning under their current workload.

Barriers Identified by Respondents	
Barriers	As percentage of total
Money concerns	60.7
Workload / Time	59.5
Distance	29.8
Study concerns while working	28.6
Lack of information	27.4
Domestic responsibilities	26.2
Reluctance to ask	23.8
Confidence	16.7
Qualifications	7.1
Other	10.7

Needs Identified for Advice and Support

Well over half of the respondents stated they were need of some form of advice or information to help them identify or take advantage of a course of learning:

- Not surprisingly, most (60%) stated that they need help with the financial support available.
- Over 50% stated that they needed help to sort out what qualifications were available.
- The same proportion also stated that they would need help to sort out the options and arrangements available for studying part time.

Advice /Support Needs Identified	
Area of Need	As percentage of total
Financial support	60.7
Qualifications available	52.4
Options for studying part time	52.4
Work-based learning	51.2
Entry Requirements	33.3
Learning support	28.6
Disability support	23.8
Childcare	10.7
Other	1.2

Comments and Conclusions

1. **Access to ULRS:** Half of all union members can call upon the services of their ULR. This gives some encouragement to the development of *unionlearn's* strategy to impact upon learning activity at work through ULRS.
2. **Profile:** Most respondents to this survey were:
 - Female (over two thirds)
 - White ethnic background (nearly four fifths)
 - In "white collar occupations" (two thirds)
 - Earned less than £20000 per year (nearly two thirds – 30% earned less than £16000)
 - Had less than ten years service (nearly two thirds)

Around 25% worked shifts or unsocial hours

3. **Learning Achievements:** Compared to the profile of respondents to the

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unionlearn national survey (see page 23); the educational achievements of members responding in the East Midlands were generally lower but broadly similar. They included 25% whose highest qualification was level 2 (22% in national survey). This corresponds with the lower levels of achievement for adults in the East Midlands reported by the Learning and Skills Council.

4. **Opportunities for workplace learning** among the respondents were generally high: Over 50% stated that their employer provided some form of learning or training opportunities at work or via work. Nearly 40% stated that they were able to take advantage of those opportunities. One third stated that they had undertaken some form of learning or training at work in the last five years and were able to cite the types of courses they had taken.
5. **The desire to undertake further learning and higher level learning was high:**
 - 77% stated that they wished to undertake some form of further training or learning.
 - Over 60% stated that they had identified a course of learning they wished to undertake.
 - 44% stated that they wished to undertake a course of learning at higher level.
6. **Perceived barriers to learning:** A large number of respondents identified one or more barriers that would prevent them undertaking further learning or training or would make it more difficult. Chief among those barriers identified were:
 - Financial (fees and maintaining income); and
 - Learning under their current workload.
7. **Needs identified for advice and support**

Well over half of the respondents said that they needed some form of advice or information to help them identify or take advantage of a course of learning.

Priority needs were for:

- the financial support available;
- qualifications available; and
- options and arrangements available for studying part time.

8. **Role of *unionlearn*:** The survey demonstrates a significant demand for higher learning at or via work, but union members and others at work lack information and guidance about financial and learning options. There is clearly a potential role for *unionlearn* to play in tackling these barriers, especially by increasing the level of information which ULRs can provide and signposting members to quality sources of guidance.

B.)Union Learning Representatives (ULRs): Results of the ULR Survey and Focus Groups

A survey of ULRs was carried out as part of the information gathering exercise in the project. Distribution of the survey (attached at Appendix 5) was carried out at the same time and using the same channels as the learners' survey.

The 35 returns reflected some of the characteristics of the learners' survey. They were returned by ULRs from just six unions, with three unions, the public and civil service union, PCS, public services union, Unison, and shop workers' union, USDAW, forming 75% of the total.

The questionnaire was designed to give some insight into how ULRs assessed their own skills and knowledge in terms of supporting members' learning, and where they saw there was a need to improve.

The survey, although small in terms of returns, gives some indication of where ULRs perceive that they have the greatest needs and interests in supporting the learning that their members may undertake.

When asked if they thought they had sufficient skills and knowledge to help members:

With Basic Skills needs	71% said they did
To gain Qualifications at levels 1 or 2	60% said they did
To gain qualification at level 3 or 4	17 % said they did

When asked if they were interested in improving their skills and knowledge with regards to:

With Basic Skills needs	80% said they were
To gain Qualifications at levels 1 or 2	94% said thy were
To gain qualification at level 3 or 4	94 % said they were

When asked to indicate interest in attending different types of training:

54% said they were interested in	the new <i>unionlearn</i> five–day ULR course in <i>Supporting Members</i>
74% said thy were interested in	the new <i>unionlearn</i> two–day ULR course in <i>Supporting Members in Higher Level Learning</i>
91 % said they were interested in	undertaking an NVQ in <i>Information, Advice and Guidance (IAG)</i>

Overall the survey showed that ULRs perceived their skills and knowledge were least sufficient in terms of supporting members at levels 3 and 4.

Correspondingly the level of interest in improving their knowledge and skills was greatest in terms of offering support to level 3 and 4 learners.

When asked to indicate which course they would be most interested in attending to improve their skills and knowledge nearly three quarters said they were interested in the two –day workshop on *Supporting Members in Higher Learning* and over 90% were interested in starting an NVQ programme in *Information Advice and Guidance (IAG)*.

Statements offered by ULRs in the Survey

A significant number of ULRs offered statements in response to the question: "What would help you most to improve what you can do to support members with their learning needs?" –

"Greater liaison with colleges and TUC to know what courses are free or funded."

"More management support for ULRs."

"A bit more communication with regards to decisions that are made. More

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information on how other areas within (my work organisation) are dealing with the problems of doing staff surveys with regards to learning needs and then, how do they solve the problems of staff not being allowed the time to attain level 2 in basic skills re the management using business needs as the reason for not allowing staff to learn."

"Many members who are in full- time employment wish for help with costs. It would appear there is little help for this group of people."

"Information about funding would be useful."

"Having a better understanding of what is available and how to access it."

"More funding, support and advice, being kept up to date, go on mailing list, having a one stop shop for ULRs"

"NVQ in IAG is a priority - more information on opportunities, providers and funding"

"Good information sources of local provision"

A link to the internet from my office computer. At the moment I am having to pass these emails to my Branch Secretary to send them off which is adding more time to her facilities. Managers actually giving members the time off without us having to go to the union to reinforce what we (the ULRs) say to them. So all managers have to have their management cascade the information about the further education policy.... Leitch agreement (sic)...So that ULRs are not so frustrated by Bureaucracy."

"To be able to give them advice straight away regarding financial help and assistance. To be able to get something we could use on departmental computers I.e. E-Learning"

"More information on what's available and how to source training/funding"

"A list of what is available, where it is and how much it will cost"

Forums

Four forums for ULRs were arranged at different locations in the East Midlands between February and April 2009. A total of 36 ULRs attended the forums. The forums served two purposes:

- Firstly, to provide the ULRs with information on the pathways into higher level learning and the funding available for learners. This was done through presentations, leaflets, brochures and live links to useful websites.
- Secondly, to gather from ULRs further information about members' attitudes to higher level learning. ULRs carried out a pre-forum investigation among their members and colleagues at work. This enabled the ULRs to participate in a more informed way in an open discussion at the forum.

Pre-Forum Investigation

ULRs were asked to carry out a pre-forum investigation based on the form provided in Appendix 6. This asked ULRs to summarise any learning or training activity at the workplace in the last five years and to gather from no more than five colleagues at work responses to the questions asked in page two of the form.

In total 48 responses were gathered from 18 of the ULRs who participated in the forums. The responses showed that:

- 70% of respondents had no experience of training or learning at work or elsewhere at level 3 or above in the last five years;
- 54% were not aware of any opportunities for undertaking

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training or learning at level 3 or beyond via their workplace;

- 58% were aware of such opportunities outside of the workplace;
- 90% were interested in taking up opportunities to train or learn at level 3 or above;
- 58% cited lack of arrangements for time off from work as the major barrier to higher learning or training;
- Four respondents stated that they had achieved a qualification at level 4 or above in the past;
- Eight respondents stated they had or were currently engaged in a course of learning at level 3; and
- 33% cited a perceived lack of financial support as a barrier to taking up higher learning or training.

Other barriers cited were:

- work patterns;
- transport to learning institutions;
- negative management attitudes;
- work loads/production pressures;
- confidence in abilities to learn after long breaks; and
- family life and childcare.

Discussions in the Forums

The discussions at the forums were recorded with the permission of those participating. They were structured so as to elicit statements from the ULRs based on what they had learnt from their pre-forum investigation, and what they had heard about higher learning in the presentation at the forum.

The discussions and statements were transcribed and examples of these are set out below under a number of broad headings:

Barriers

- *“When I carried out my investigation, members I talked to had decided that higher learning was not for them, the main reason being the workload in their current jobs. The other main barriers which people mentioned were the costs involved, but also finding out which courses are available. In one case a member wanted to explore doing a work-related course but many people were interested in doing something entirely different, not necessarily work related. In my experience people will not get time off to learn unless the course is work related.”*
- *“We had Learn Direct courses on site which the employer or the Government covered the costs of up to level 2. But once people wanted to go beyond that, the view was that the courses were too expensive. Only one person moved up to a level 3 course.”*

Attitudes of Members/Learners

- *“Overall, I got the impression that people were ruling options out for themselves without getting sufficient information to make the decision.”*
- *“When I asked people about higher learning, some were put off by the term “higher learning”. They immediately decided that it wasn’t for them.”*
- *“In my experience it’s more acceptable to talk about the NVQ levels because that’s what a lot of people already know about. If they have an NVQ at level 2 or 3 then they feel more comfortable to talk about the next level.”*
- *“Most people I approached were both baffled and resistant to the idea of doing higher level learning – but we do have people working in care services who have undertaken NVQs up to level 2 and have got a bit of a taste for learning. And they responded more positively.”*

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- *“The experience of bringing in an NVQ programme was very instructive. Initially no one wanted to do it because no one else was. There was desire to stay “one of lads”. But when a few started, it got the ball rolling. Any other training above level 2 was often based on who you were, not what your needs were. It was nepotistic. But many managers also had needs and skills gaps and when asked would say they hadn’t got time to learn.”*

Attitudes of Employers

- *“Where the employer is forced by an outside body or regulations to get the workforce up to a certain level then they get on with it. But the idea of supporting higher level learning is still not common amongst managers. Where I work, in dentistry, there has been an introduction of professional qualifications for jobs that previously didn’t require them - like dental nursing – and so there has been a big push to bring everyone up to a minimum level, with exams and registration. To achieve this there is a system of study leave but when there are sick absences they are required to come in.”*
- *“There’s no top down drive to create a learning culture in the council which would help ease up these restrictions on management’s approach to higher level. So for example we have 14 Apprentices out of a workforce of 8000 and no Advanced Apprentices as yet. It can be overcome by Department Heads who can make a difference in driving up higher learning – but there are very few with the right vision now.”*
- *“Employers in the private sector tend to offer very little support for learning which is not work related or where they can’t draw down government funding - like for Skills for Life. But in the private sector the employer uses training or learning like a reward. If your face fits you’ll get it.”*
- *“All further training or learning at the county council has got to be linked to the personal development reviews. If it’s not*

work-related or identified as a need in the PDR then it won’t be approved for support or time off.”

- *“In my experience at HMRC very few people move up from Administrative grades to Inspector grades via this system. They use a talent management system or fast track to push people who are already qualified into the higher grades.”*
- *“I have found that the key thing to make a programme of learning in an organisation work for all grades is the commitment at the highest level of management. If senior managers are on board it’s more likely to happen. We found that if we get that commitment set out in our learning agreement then they are more likely to respond positively to requests for training and time off for learning. But at this moment our learning agreement says nothing about higher level learning as such.”*
- *“In the Fire and Rescue Service higher level learning is all related to training provided for those who have gained promotion – up to level 5. But for those seeking to move up the ladder, the traditional ethos is that if you’ve got a skills gap then it’s up to you to identify it and do something about it – in your own time and without much support. But that’s changing now.”*

What Needs to Be Done

- *“The Openings courses provided by the OU and supported by Unison has been a success.”*
- *“As far as the Government is concerned all of this agenda is driven by the performance – either of the economy or of the company – and there’s little room for personal learning.”*
- *“If the Government wants to achieve these targets for adults who have a level 4 qualification, then it really should make it harder for employers to refuse*

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release for learning and for workers to demand release. There's no legal right to time off for learning – it's all dependent on the employers say so and very often the employers are not playing ball. The Government needs to realise this and pass some new laws – just like they did for parents' right to time off to look after children⁵⁰. Many employers are not aware of the larger picture – why we need a greater number with higher qualifications. They are only looking at their bottom line with no view to the future and no view of society. “

- *“Until we get a corporate and strategic approach towards higher learning it will continue to be down to the luck of the draw. It's very difficult to get individual managers to change their approach without that, and especially when the council is shedding jobs in the recession.”*

The Role of the ULRs

- “As far as I can see our role has got to be focused on creating space for higher learning opportunities to be taken up at work – to influence the way in which work is organised so that space is created for learning. The ULR can provide information and point people in the direction of where their interests may lie.”
- “The ULR could also get involved in discussions about workload to create space for learning. However when I mentioned this to the members they were very doubtful if it could be achieved and that their workloads would stay the same and they'd have to do a lot of the work at home.”
- “We negotiated the Openings courses with the help of the union's learning

officer and it involves time off for courses and exams. But it wouldn't have happened if the union hadn't covered the cost of the fees. And it's one thing starting the course. It's another to see it through. Where there's no cost to the individual, except for time and effort, then it depends on motivation. Completions are not as high as hoped and I think some members signed on without the necessary motivation.”

- “We have a lifelong learning agreement in the PCT where I work. The agreement is aiming to create more opportunities for staff on lower grades outside of mandatory training which is specified for the type of work being done. “
- “A branch learning team is a vital to sustain any campaign on learning because one person can't do it all on their own.”
- “At the County Fire Service we've negotiated a specific agreement for the county brigade and one particular college in the Midlands which involves a “Skills Check” on 1000 staff. So that the employer gets a statistical breakdown of the levels that check revealed – and what the greatest needs were, what we've arranged is that those with the same or similar needs will get support in the workplace – so that it's provided in line with shift patterns. And if people want to do it in their own time – fire fighters do get large blocks of time off – then they can go to the college. What clinched it for us is that the college had the *unionlearn* quality mark.”
- “There needs to be a Higher Skills Pledge to match the Skills Pledge in general. Written learning agreements are no substitute for legal requirements. The employer will ignore the ULRs despite the agreement. And you can't create a grievance out of every difficulty.”

⁵⁰ Since these focus groups were held the government has announced consultations on a proposed right to request time off for training, modelled on the existing rights to request flexible working
<http://www.dius.gov.uk/consultations/~media/publications/T/TimeToTrain>

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Conclusions from ULR Forums and Pre-Investigations

The results of the ULR survey and pre-forum investigation will come as no surprise when reflected against the wider learners' survey conducted for this project, the information gathered by the Learning and Skills Council (LSC) in the East Midlands or the information gathered by *unionlearn* in its wider surveys of union learners. Nonetheless they do add reinforcement to an emerging set of conclusions:

- The ULR survey results give support to the development of a *unionlearn* programme of training to target the skills and knowledge of ULRs with regards to supporting members in higher learning. The two-day workshops which have been developed by *unionlearn* are likely to be successful in terms of applications in the East Midlands.
- The interest among ULRs in underpinning their skills and knowledge by gaining an NVQ qualification in Information, Advice and Guidance (IAG) is high and is likely to succeed in attracting sufficient applications to form one of more cohorts of ULR learners.
- Comments offered by the ULRs reinforce their need for improved information and the desire to see in place both financial support for higher learning that is attractive to members at work, and legal rights to time-off for learning.
- The responses to the ULR pre-forum investigation shows that while there is a significant level of interest in higher level learning at the workplace, a large proportion (58%) had no awareness of higher learning opportunities at their workplaces.
- By contrast there is high level of reported awareness of where high level learning opportunities exist outside the workplace.
- The barriers perceived by learners in the workplace are significant and focus on time off and finance.
- ULRs are keen to support members in higher learning but have distinct information and knowledge needs themselves.
- Few ULRs have experience of supporting higher level learners.
- ULRs have varied experience with employers, but where there is outside regulation higher level learning can be achieved at work
- ULRs have cited examples where learning agreements have help to introduce new opportunities but are skeptical that Government targets can be met without legislation.

8: Conclusions and Way Forward

The National Context

- Over the last 40 years several avenues were introduced to enable those without formal qualifications to progress to higher education: including the Open University, Access to HE and Foundation Courses
- Despite these developments, the Government' identified a need for Higher Education Institutions to widen participation in higher education and to offer flexible forms of education for people at work
- The Leitch report of 2006 showed that the skills base of the UK remains weak by international standards, holding back productivity, growth and social justice.
- Leitch proposed a target of more than 40 per cent of all adults to have a higher education qualification (at level 4 and above) by 2020 – a target which was accepted by the government
- Leitch proposed a “Demand-Led” system to be set up for all publicly funded, adult vocational skills.
- Employers have identified that the skills they want workers to gain or possess but which are generally lacking in the workforce
- A number of initiatives have been taken from 2003 to increase take-up of HE, including the launch of HEFCE's Strategic Development Fund and the introduction of LLNs aimed at people at work, but the Government and higher education institutions have been criticised for failing to improve the “offer” to adults and part time students.
- Government plans and targets for the expansion of numbers in higher education are likely to be impacted

by the economic downturn – which , conversely , has resulted in an increase in applications form adults

The East Midlands Context

- The East Midlands lags behind the UK as a whole and most other Regions as far as learning and training is concerned.
- The Region was placed 7th out of 9 regions in the England in terms of the participation by people of working age in job-related training and has a lower proportion than the UK of people with level 4 or above qualifications
- In 2006/07 adult participation in Further Education was severely affected by the overall drop in adult participation in learning.
- The Regional Learning and Skills Council has set out its demand-led strategy and recognised that productivity, particularly in the East Midlands, depends on increasing the proportion of those with Level 3 and Level 4 qualifications.
- The LSC recognise that attitudes towards training and learning amongst East Midlanders represent a challenge. They are using a variety of vehicles to overcome
- Work Based Learning has been developed via the LLNs in the region
- In 2008/09 there were 264 different Foundation Degree courses were in the Region on which 6152 students were enrolled

The Union Context

- Unions have long recognised the benefits of higher learning for members and have long campaigned to open up the higher education to those with low income

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or with limited outcomes from their time at secondary schooling.

- Unions have broadly welcomed the Leitch findings are skeptical of its “post-voluntaristic” approach. The TUC holds that other more forceful and legally-based measures are needed to overcome employer resistance.
- The research commissioned to underpin the *Trade Unions Aim Higher* project has shown that many existing members of trade unions are already highly qualified and many were motivated to continue learning. However the survey also revealed substantial barriers in terms of time and money to accessing provision.
- The TUC concluded that there need to be more incentives for employers to provide paid time off to learn and contribute to fees; there need to be rights for unions to negotiate such opportunities; and much more flexibility in the delivery of provision is required, customised to the needs of the adult learner.
- It also identified that Union learning Representatives can play and are playing an important part in helping and supporting their members to access higher education.
- Via the *Trade Unions Aim Higher* project, individual unions have demonstrated ways in which these aims can be met. Tools and materials have been developed for ULRs: new partnerships have been formed and agreements made for union members to access higher education; and in three regions pilot projects have been launched and evaluated.
- Key developments have been the partnership with the Open University, the setting up of Union Learning Clubs in Greater Manchester; and the wide scale provision and take-up of IAG

training amongst ULRs in the North East.

Union Initiatives in the East Midlands

Several recent initiatives have been taken by unions and *unionlearn* to open up access to higher level learning:

- In 2006 a cohort of ULRs undertook the NVQ in Advice and Guidance at level 3; in 2009 a further cohort of 12 PCS ULRs began a re-modelled version the in NVQ IAG via Leicester College.
- In 2007 *unionlearn* in the Midlands launched a project to broker management skills via *unionlearn* and TUC affiliates in the region. To date over 900 learners have undertaken ILM units under this project.
- In 2007 *unionlearn* Midlands began work with the LLN covering Nottinghamshire and Derbyshire and the University of Derby to develop a project aimed at bridging the gap in progression from level 3 to level 4.

Unionlearn Survey of Learners

The key findings Learners Survey are:

1. **Access to ULRs:** Half of all union members responding can call upon the services of their Union Learning Representative. This gives some encouragement to the development of *unionlearn*'s strategy to impact upon learning activity at work via the ULRs.
2. **Profile:** A majority of the respondents to this survey were:
 - Female (over two thirds)
 - White ethnic background (nearly four fifths)
 - In “white collar occupations” (two thirds)
 - Earned less than £20000 per year (nearly two thirds – 30% earned less than £16000)

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- Had less than ten years service (nearly two thirds)

Around 25% worked shifts or unsocial hours

3. **Learning Achievements:** Compared to the profile of the respondents to the *unionlearn* national survey, the achievements of members responding in the East Midlands were generally lower but broadly similar. Significantly they included 25% whose highest qualification was level 2. This corresponds with the lower levels of achievement for adults in the East Midlands reported by the LSC.

4. **Opportunities for workplace learning** amongst the respondents were generally high: over 50% stated that their employer provided some form of learning or training opportunities at work or via work. Nearly 40% stated that they were able to take advantage of those opportunities. One third stated that they had undertaken some form of learning or training at work in the last 5 years and were able to cite the types of courses they had taken

5. **The desire to undertake further learning and higher level learning was high:**

- 77% of those stated that they wished to undertake some form of further training or learning.
- Over 60% stated that they had identified a course of learning they wished to undertake
- 44% stated that they wished to undertake a course of learning at higher level

6. **Perceived barriers to learning:** A large number of respondents identified one or more barriers they perceived which would prevent or make more difficult to realise their desire to undertake further learning or training. Chief amongst those barriers identified were:

- Financial (fees and maintaining income)
- Learning under their current workload.

7. **Needs identified for advice and support**

Well over half of the respondents stated they were need of some form of advice or information to help them identify or take advantage of a course of learning. Priority needs were for:

- financial support available
- qualifications were available
- options and arrangements available for studying part time.

The survey of Union Learning Representatives

- Overall the survey showed that ULRs perceived their skills and knowledge were least sufficient in terms of supporting members at levels 3 and 4.
- Correspondingly the level of interest in improving their knowledge and skills was greatest in terms of offering support to level 3 and 4 learners.
- When asked to indicate which course they would be most interested in attending to improve their skills and knowledge nearly three quarters said they were interested in the 2 –Day Workshop on Supporting Members in Higher Learning “ and over 90%% were interested in starting an NVQ programme in Information Advice and Guidance.
- The interest amongst ULRs in underpinning their skills and knowledge by gaining an NVQ qualification in Information, Advice and Guidance is high and is likely to succeed in attracting sufficient applications to form one of more cohorts of ULLR learners.

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- The ULR survey results give support to the development of a *unionlearn* programme of training to target the skills and knowledge of ULR with regards to supporting members in higher learning. The 2 day workshops which have been developed by TUC *unionlearn* “Supporting Union Learners into Higher Learning” are likely to be successful in terms of applications in the East Midlands.
- Comments offered by ULRs reinforce their need for improved information and the desire to see in place both financial support for (access to) higher learning that is attractive to members at work. And legal rights to time off for learning

ULR Focus Groups and Pre Investigations

- The responses to the ULR pre forum investigation show that while there is significant level of interest in higher level learning at the workplace amongst members, a large proportion (58%) had no awareness of higher learning opportunities at their workplaces
- By contrast there is high level of reported awareness of where high level learning opportunities exist outside the workplace
- The barriers perceived by learners unearthed in this ULR investigation correspond with those identified in the learners survey and focus on time off and finance

The focus group discussions show that

- ULRs are keen to support members in higher learning but have distinct information and knowledge needs themselves
- Few ULRs have experience of supporting higher level learners

- ULRs have varied experience with employers – where there is outside regulation higher level learning can be achieved at work.
- ULRs have cited examples where learning agreements have help to introduce new opportunities but are skeptical that Government targets can be met without legislation requiring time off for learning.

Overall Conclusions

- 1 The opening up of pathways to gain of higher level qualifications and skills remains a vital component of the Government’s economic and social justice strategies. It is recognized by unions as a key means by which members can increase their prosperity and life chances and inequalities can be reduced.
- 2 There are nonetheless considerable barriers remain for many adult learners at work, especially those wanting to move to the cusp of Higher Education. Support for Level 3 learners who are at work is poor.
- 3 The surveys of learners and of ULRs in this project and elsewhere demonstrate a significant demand for higher learning at or via work but show that members and others at work lack information and guidance about financial and learning options. There is clearly a potential role for *unionlearn* to play in tackling these barriers, especially by increasing the level of information which ULRs can provide and the signposting of members to quality sources of guidance.
- 4 Most potential higher learners see financial matters as a major barrier to moving into higher learning: This perceived barrier has almost equal weight as lack of information about HE and problems connected with

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workload and release. ULRs in the Focus groups supported the TUC's campaign for legislation to back a right to release for learning.⁵¹

- 5 ULRs in these unions are keen to promote higher learning and gain the information and skills needed to do that. However they identify a widespread restrictive approach amongst employers who view learning purely in job specific terms.
- 6 *unionlearn* has been working with projects in the East Midlands that have successfully engaged hundreds of new learners in level 3. These initiatives can form the basis of a cohort of potential learners that, with suitable support, could progress to level 4.
- 7 The project has identified avenues by which learners could access or gain higher level learning - however the level of information about these pathways and institutions amongst ULRs is low.
- 8 Few ULRs in the Region operate within workplace projects which have gained the Matrix standard for Information Advice and Guidance or gained the training to enable them to offer advice and guidance to higher level learners.
- 9 Building on the tools developed in the *unionlearn*'s Aim Higher programme *unionlearn* in the Midlands Region will be to offer training to ULRs and give quality signposting to potential higher learners.
- 10 The *unionlearn* survey results give backing to the development of

programme to train ULRs with regards to supporting members in higher learning.

- 11 *Unionlearn* in other regions has developed models to create progression routes to level 4 and nationally has entered into agreements with providers, particularly the Open University. While some initiatives have been taken in the *unionlearn* Midlands region to support higher level learning comprehensive "higher level offer" for union learners has yet to be developed.

The Way Forward

This investigation has identified a significant potential for a positive response amongst union learners and union learning representatives to initiatives which will increase their awareness of and entry into pathways leading to higher level learning. The "models" developed elsewhere by *unionlearn* will need to be adapted to suit the context and the current "state of play" in the East Midlands.

This investigation has shown that *unionlearn* and unions in the region have limited experience in supporting learners at the traditional definition of higher learning (level 4 and beyond). However the surveys and responses at focus groups show that both union learners and ULRs are keen to make progress towards this goal. By contrast *unionlearn* and ULRs in the East Midlands have accumulated widespread experience in assisting learners to gain level 2 and level 3 qualifications. With this context in mind a range of actions are proposed in conjunction with potential partners:

1. **Direction towards Higher Learning:** *unionlearn* to concentrate its efforts in the immediate future to creating support mechanisms for union-learners to access level 3 and create union-appropriate pathways to progress to level 4.

⁵¹ ⁵¹ Since these focus groups were held the government has announced consultations on a proposed right to request time off for training, modelled on the existing rights to request flexible working
<http://www.dius.gov.uk/consultations/~media/publications/T/TimeToTrain>

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2. **Seminars:** convene a series of seminars for institutions and bodies in the East Midlands. The seminars will aim to put the findings of this investigation, identify means by which further support can be gained and develop partnerships to create region-wide *unionlearn* "Progress to Higher Learning" offer for union members.
3. **ULRs:** to prioritise the training and support of ULRs in the first instance. Based on the interest demonstrated by ULRs via this project *unionlearn* will :
 - a) offer workshops and familiarisation events for ULRs and members on higher level learning;
 - b) seek to develop and distribute a pamphlet to inform ULRs about higher level learning in the East Midlands (see footnote 44 page 25)
 - c) continue to offer advice and guidance to unions and employers seeking to support ULRs through the NVQ in Advice and Guidance;
4. **Build on unionlearn's Level 3 initiatives in Region:** to create a systematic follow up on learners who attended the ILM courses and workshops (at level 3) over the period 2007-08 to inform them of the pathways and possibilities for further and higher learning in conjunction with Next Step.
5. **Develop Access Courses:** to build on the work of LLNs in the East Midlands by inviting the Region's HE institutions to investigate the development of access to higher education for union learners which would incorporate flexible, "union-friendly" characteristics (as identified by TUC research) and which could be offered across the region following an agreed format .
6. **Work with the Open University:** to further engage with OU in the Midlands and build on the work done nationally and in regions by *unionlearn* and individual unions. Those discussions should be wide-ranging but include:
 - Generating regional publicity eg for the *unionlearn* 10% reduction on initial OU courses;
 - Exploring the possibility of creating union learning clubs in the major East Midlands conurbations amongst higher level union learners.
7. **Redundancy Support:** to create region-specific advice and information about the role and benefits of higher education for union members facing redundancy and to work with appropriate bodies, such as Next Step, to ensure that this advice and guidance is appropriately applied.

Appendices

Appendix 1: Key Documents and Sources

Access to Higher Education: *Student Guide*

<http://www.accesstohe.ac.uk/home/publications/caseStudies/studentguide.pdf>

DIUS: Financial Support for Part Time Students in Higher Education -

http://www.direct.gov.uk/en/EducationAndLearning/UniversityAndHigherEducation/StudentFinance/ApplyingfortheFirstTime/DG_171529

DIUS: *Higher Education at Work - High Skills: High Value: 2008*

http://www.dius.gov.uk/consultations/~/_media/publications/Higher_Education_at_Work

DIUS: *World Class Skills: Implementing the Leitch Review of Skills in England 2007*

<http://www.dcsf.gov.uk/skillsstrategy/uploads/documents/World%20Class%20Skills%20FINAL.pdf>

East Midlands Development Agency Regional *Economic Strategy for the East Midlands 2006-2020*. 2006

<http://www.emda.org.uk/res/>

East Midlands Learning and Skills Council: *Regional Strategic Analysis 2008/09 Part 2: Adult Skills in the East Midlands 2008*

<http://www.lsc.gov.uk/regions/EastMidlands/Publications/Recommended/>

Fisher, John : *Bread On The Waters: History Of the TGWU Education 1922-2000* 2005

Foundation Degree Forward: *The Impact of Foundation Degrees on the Workplace and Students – A Summary of Research Projects Commissioned by FDF*

http://www.fdf.ac.uk/files/fdf_research_summary.pdf

Griggs, Clive : *The TUC And Education Reform 1926-1970* 2002

LearnDirect: *Learning Through Work* <http://www.learningthroughwork.org>

Leitch, S.: *Prosperity for all in the Global Economy – world class skills*. HM Treasury, December 2006.

http://www.hm-treasury.gov.uk/leitch_review_index.htm

Quality Assurance Agency for Higher Education (QAA): *Accreditation of Prior Learning*

<http://www.qaa.ac.uk/academicinfrastructure/apl/default.asp>

Skills for Sustainable Communities Life Long Learning Network (SSCLLN)

<http://www.le.ac.uk/ssclln/>

TUC: *Developing pathways to higher level learning for union learners 2007*

<http://www.unionlearn.org.uk/publications/index.cfm?fmPubID=109>

TUC: *Higher Education at Work TUC consultation document* June 2008

<http://www.unionlearn.org.uk/policy/learn-2285-f0.cfm>

TUC *Learning Unlimited: A survey of union members and higher education opportunities*, 2007

<http://www.unionlearn.org.uk/files/publications/documents/114.pdf>

TUC North West: *Reaching New Heights – A Higher Education Handbook for Union Learning Representatives*; unionlearn and Aim Higher Greater Manchester 2008

TUC: *Supporting Learners into Higher Learning – a toolkit for union learning reps*

<http://www.unionlearn.org.uk/advice/learn-2648-f0.cfm>

TUC: *Trade Unions Aim Higher - higher level learning for trade union members –case studies of recent learners 2008*

www.unionlearn.org.uk/publications/index.cfm?fmPubID=129

Your Future East Midlands – *Courses and Careers Information website* :

<http://www.yourfuture-eastmidlands.co.uk/>

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Appendix 2: Examples of Qualifications within the UK National Framework

Level	Examples of education qualifications within each level	Descriptor
8	Doctoral degrees (e.g., PhD/DPhil (including new-route PhD), EdD, DBA, DClinPsy)	Make a significant and original contribution to a specialised field of inquiry demonstrating a command of methodological issues and engaging in critical dialogue with peers; accepting full accountability for outcomes.
7	Master's degrees (eg, MPhil, MLitt, MRes, MA, MSc)	Display mastery of a complex and specialised area of knowledge and skills, employing advanced skills to conduct research, or advanced technical or professional activity, accepting accountability for related decision-making including use of supervision
	Postgraduate diplomas	
	Postgraduate Certificate in Education	
	Postgraduate certificates	
6	Bachelor's degrees with honours (eg, BA/BSc Hons)	Critically review, consolidate and extend a systematic and coherent body of knowledge, utilising specialised skills across an area of study; critically evaluate new concepts and evidence from a range of sources; transfer and apply diagnostic and creative skills and exercise significant judgement in a range of situations; and accept accountability for determining and achieving personal and/or group outcomes.
	Bachelor's degrees	
	Professional Graduate Certificate in Education	
	Graduate diplomas	
	Graduate certificates	
5	Foundation Degrees (eg, FdA, FdSc)	Generate ideas through the analysis of concepts at an abstract level, with a command of specialised skills and the formulation of responses to well defined and abstract problems; analyse and evaluate information; exercise significant judgement across a broad range of functions; and accept responsibility for determining and achieving personal and/or group outcomes
	Diplomas of Higher Education (DipHE)	
	Higher National Diplomas (HND)	
4	Higher National Certificates (HNC)	Develop a rigorous approach to the acquisition of a broad knowledge base; employ a range of specialised skills; evaluate information using it to plan and develop investigative strategies and to determine solutions to a variety of unpredictable problems; and operate in a range of varied and specific contexts, taking responsibility for the nature and quality of outputs
	Certificates of Higher Education (CertHE)	
	BTEC Level 4 Professional Diploma	
	BTEC Level 4 Professional Certificate	
	NVQ Level 4	
3	A Level	Apply knowledge and skills in a range of complex activities demonstrating comprehension of relevant theories; access and analyse information independently and make reasoned judgements, selecting from a considerable choice of procedures, in familiar and unfamiliar contexts; and direct own activities, with some responsibility for the output of others.
	Access Certificates	
	Advanced Apprenticeship	
	Advanced Diploma	
	BTEC Level 3 Award	
	Level 3 NVQ	
	City & Guilds, Level 3.	
	NEBOSH National General Certificate in Occupational Health and Safety.	
2	GCSE at grades A–C	Apply knowledge with underpinning comprehension in a number of areas and employ a range of skills within a number of contexts, some of which may be non-routine; and undertake directed activities, with a degree of autonomy, within time constraints.
	European Computer Driving License L 2	
	Certificate in Adult Numeracy Level 2	
	NVQ Level 2	
1	GCSE D–G	Employ a narrow range of applied knowledge, skills and basic comprehension within a limited range of predictable and structured contexts, including working with others under direct supervision, but with a very limited degree of discretion and judgement about possible action
	NVQ Level 1	
	National Basic Skills Test - Literacy (EDEXCEL Level 1)	
Entry 0	Certificate in Adult Literacy Entry Level	Employ recall and demonstrate elementary comprehension in a narrow range of areas, exercise basic skills within highly structured contexts, and carry out directed activity under close supervision.

Appendix 3: What is a union learning club (ULC)?

Source: TUC with *Unionlearn in the North West Region 2007*

What is a union learning club (ULC)?

Union learning clubs vary in what they cover and how they operate. Broadly there are work-based HE study groups where learners receive support from their peers (other learners from their workplace taking similar courses), encouragement from their ULR/union project worker and specialist support from a course or study skills tutor from an HE provider.

What does the ULC do?

That is up to the learners, ULRs and HE providers to agree what they want to cover in the ULC sessions. In some cases the ULC meets about once a month. They are often (but not always) focused on those learners who have not studied at HE before or do not feel so confident about taking up an HE course. Examples of activities include:

- **Help with applying and registration on courses:** This process can be complex and registration dates are usually fixed, so the ULC can also support members by running activities that help members apply for and register on courses (including applying for any discounts or the accreditation of prior learning – see section 4).
- **Study skills support:** For learners new to HE the ULC can offer an opportunity for learners to build their study skills. This was felt to be too specialised a role for most ULRs to deliver (although not necessarily) so setting up the ULC needs the HE provider (or other specialist) to be able to run this type of session.
- **Help with arranging funding:** In one ULC, unionlearn worked in partnership with Aimhigher and the OU to develop ULCs in the Greater Manchester area, This model includes ULRs getting a free introductory OU course and union members are eligible for a 50% discount on courses, although many did not pay anything as they qualified for OU financial support for people on low incomes.
- **Supporting post-course progression:** The ULC often (but not always) focuses on supporting learners to access introductory courses. So the ULC can also look at running activities for members as they near the end of their course to think about next steps. All OU students are entitled to free careers information, advice and guidance.
- **Review and evaluation:** An effective ULC sets up good channels of communication between the learners, ULC support workers, course tutors and the ULRs/project workers. This includes sharing data (as long as learners agree to this) on who and how many learners have registered, key course dates and progress. In addition, the ULC can get feedback from learners about their experiences to help shape any future work with the ULC and HE provider.

How does a ULC get going?

The starting point is agreeing what HE provision learners want/are they interested in and agreeing with HE provider(s) how best to promote what is available. Most ULCs get going by carrying out activities to raise awareness in the workplace, this includes posters advertising the ULCs and briefing events for ULRs and then learners.

Awareness raising activity also can include

- putting together information packs containing the details of the courses and more about the ULC for distribution to interested potential learners
- Briefing employers to get their support for ULC activity

What is the ULR/union project worker role?

The role of the project worker and/or ULRs in each ULC needs to be identified and agreed. This can be on organising the events and liaising with the HE support team, negotiating with the employer for time off for the ULC for learners and getting access to venues/equipment etc.

ULRs and union project workers can also have a role in negotiating with the HE provider and the employer on accessing resources and funding for the ULC and HE course – see below and the following sections on working with employers and providers.

What is the HEI role?

The union learning club can be a group that meets (e.g. once a month) or a network of learners in the workplace that is supported by other methods such as phone and email contact by a study skills/learning support worker. (Section 5 of the source document covers discussions and agreements with provider to agree how learner support need will be met.

Appendix 4: Actions Proposed by *unionlearn* in its review “Developing pathways to higher level learning for union learners” 2007

<http://www.unionlearn.org.uk/publications/index.cfm?frmPubID=109>

Action 1: The development and implementation of *unionlearn* strategy for higher level learning/learners setting out key objectives and clear roles and responsibilities.

Action 2: Further review and development of resources developed during phase 1 of the project (the *Unionlearn* Climbing Frame and HE module for ULRs) to help ensure effective take-up and use.

Action 3: Build proactive approaches to joint work between *unionlearn*, unions and HEIs at the national and regional level.

Action 4: Develop progression pathways for different kinds of learners. These could include pathways to support:

- taster/bridging courses for new entrants to higher level learning, including exploring the development of a *unionlearn* return to learn programme.

- progression from level 3 programmes, including apprenticeships
- continuing education course for those motivated by personal goals
- professional courses for CPD learners and activists
- specialist provision for learners in target sectors
- the development of bespoke programmes of study
- the set up and delivery of union learning clubs.

Action 5: Develop higher level learning activity with a wider range of unions and ULRs, in other regions and with other HEIs and intermediary organisations.

Action 6: Further test these progression pathways to review outcomes for union learners and to help refine the ‘learner journey’ and union learning club models.

Action 7: Identify the key costs and additional resources required for the delivery of the effective and sustainable union higher learning pathway models.

Action 8: Identify the funding options available to unions and other partners to support this work.

Action 9: Develop channels of communication with key stakeholders and communicate the findings of the Trade Unions Aimhigher work to help inform and influence:

- unions, HEIs and HE network organisations of the nature and scope of the higher learning progression models
- government policy for the HE sector.

Action 10: Embed higher level learning within *unionlearn* structures, including the work of the national board, and national and regional teams, and embed higher level learning alongside and within other *unionlearn* activities in ULR training, TUC Education, the Union Learning Fund and the provider quality mark.

Action 11: Undertake more extensive research into the characteristics and expectations of union learners, their demand for higher-level learning, aspirations and barriers to inform the actions above. Plus, build approaches to data collection that can track the progression routes of union learners.

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Appendix 5: Learning and Careers: Useful Websites and Helplines

<p>unionlearn Learning and Careers Website: http://www.unionlearn.org.uk/advice/learn-1531-f0.cfm</p>
<p>Course directory for learners: More than 950,000 courses from over 10,000 providers. Search online to find courses in your area, or register a course to ensure its details are included if you're a course provider. http://www.unionlearn.org.uk/courses/index.cfm?CAS=1</p>
<p>Job Profiles: Unsure about what jobs are out there? Want to find specific information about work, hours, income and more? Search more than 700 job profiles online. http://www.unionlearn.org.uk/courses/index.cfm?CAS=1</p>
<p>Free expert advice: Get free expert advice on your learning or career options. Ask for a Unionlearn advisor to call you back at a time that suits you. All calls are completely free. 08000 92 91 90 http://lsc.phoneme.net/50197/CallBack.html</p>
<p>Your Future East Midlands – Courses and Careers Information website : http://www.yourfuture-eastmidlands.co.uk/</p>
<p>Funding Directory: An essential directory of non-charitable sources of funding to help support education and learning - available online now. http://www.advice-resources.co.uk/adviceresources/general/dir/fun_dir/</p>
<p>Get On adult learning service. Get On helpline: 0800 66 0800 or go to : http://www.direct.gov.uk/en/EducationAndLearning/index.htm and choose: Adult Learning and Skills</p>
<p>Useful Tools:</p>
<p>CV Builder: Everything you need to create a job-winning CV, application form or covering letter. https://www.cvbuilder-advice-resources.co.uk/</p>
<p>Skills and Interests Assessment: Identify key skills and interests to explore a range of relevant career options. http://www.skillsandinterests.com/</p>
<p>Adult Decision Making Readiness Tool: Good at making decisions? Can't decide? Check out our interactive, online questionnaire to help your clients assess their skills and determine their decision-making ability. http://careersadvice.direct.gov.uk/helpandadvice/dmr/</p>
<p>Essential guides to use independently or with support</p>
<p>Finding an Access to HE Course: website offering search of 1000 courses leading to Access to Higher Education Diploma available in most further education colleges in England and Wales www.accesstohe.ac.uk</p>
<p>Foundation Degrees in the East Midlands http://www.emfec.co.uk/uploads/Foundation_Design_08.pdf</p>
<p>Learn Direct: Learning Through Work http://www.learningthroughwork.org</p>
<p>Asylum Seeker and Refugee Guides: Two downloadable guides packed with information and useful contacts to help you point people in the right direction. http://www.advice-resources.co.uk/adviceresources/general/guides/asylum/</p>
<p>Disability Awareness guide: Introduction to learning difficulties and disabilities - an activity-led guide for nextstep advisors. http://www.advice-resources.co.uk/adviceresources/general/guides/disability/</p>
<p>unionlearn Promotional Materials</p>
<p>Supporting you and your learners with a new advice line (Leaflet) http://www.unionlearn.org.uk/files/publications/documents/95.pdf</p>
<p>unionlearn Advice line poster (A3) http://www.unionlearn.org.uk/files/publications/documents/110.pdf</p>

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Appendix 6: Access to Higher Level Learning and Skills: Learners' Survey

About you			
1. Your gender		2. What age are you	
3. Are you a member of a trade union?		4. Is so please give name of your union	
5. Name of your employer/ company / organisation		6. Location of your workplace (nearest town)	
7. What product is made or what service is provided at you workplace?		8 Which one of the following best describes your current type of job (<i>Please tick one only</i>) - Professional and Technical..... - Clerical and Secretarial - Craft and Related - Manager / Administrator..... - Plant and Machine Operatives..... - Sales - Other occupations (please state).....	
9. How would you describe your ethnic background?		10. What is your annual salary to the nearest thousand £, before tax? (<i>Please tick one only</i>) up to 9,999.....10,000 - 15,999..... 16,000 - 19,999.....20,000 - 24,999..... 25,000 - 29,99930,000 - 39,999..... 40,000 - 49,999Above 50,000..... I prefer to not answer this question.....	
11. How long have you worked for your current employer?		12. Do you work (please tick) Full time?~ Part time?~	
13. Do you work (please tick) Unsocial hours?~ Shifts?~		14. Are you able to talk to a Union Learning Representative where you work? Yes ~ No ~ Not sure ~	
About Your Learning Experience			
15. Please indicate what type of qualification you have currently, or have recently completed studying, by ticking the following:- I do not have any formal qualifications ~ Level 1 (e.g. NVQ level 1) ~ Level 2 (e.g. Cases, O levels , GCSEs) ~ Level 3 (e.g. Apprenticeship, A levels) ~ Level 4 (e.g. degree) ~ Have some qualification but do no know the level~	16. Does your current employer offer learning and training leading to formal qualifications? Yes ~ No ~ Not sure~	17. If so, are you able to access these learning and training programmes? Yes ~ No ~ Not sure~	
18. Are you currently doing or have you done in the last 5 years any learning courses <u>At Level 3 or above?</u> If so please specify below:			

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Course and Qualification level (1 to 7)	Date Started	Date Finished	Name of College or Provider	Any time off work provided?	Any other support from your employer?
19. Would you like to take part in any type of course or study in the near future/next couple of years? Yes No Not sure					
20. If 'yes' or 'not sure' what type of learning might you be interested in? Learning for pleasure Learning for work Please give details _____					
21. If you are interested in studying higher education qualifications, what course or subject would you like to study? _____ Not Sure					

22. What might stop you taking part in higher education courses? (Tick more than one if relevant)

Lack of information on courses and providers

Distance to nearest course venue

Current qualifications

Lack of confidence that I could do it

Workload/Time

Reluctant to ask my employer for time off / support

Money – concerns of cost of fees and debt

Not sure that I can study whilst working

Domestic responsibilities

Other please give details

23. If you are interested in higher education study, what advice and support would you find useful? (Tick more than one if relevant)

The qualifications available Part-time study options Work based learning courses

Entry requirements Financial support available Learning support Childcare available

Careers advice Disability support Other please give details

Appendix 7: Supporting Members in Learning: Survey of Union Learning Representatives

About you

1. Your Name: _____

2. Your email address: _____

3. Your Union: _____

4. Your Employer: _____

5. Location of your workplace: _____

6. What product is made or what service is provided at you workplace?

7. Do you believe that you have sufficient skills and knowledge to advise and signpost members to gain:

Basic Skills Qualifications	yes	<input type="checkbox"/>	no	<input type="checkbox"/>
Qualifications at level 1 or 2	yes	<input type="checkbox"/>	no	<input type="checkbox"/>
Qualifications at level 3 or 4	yes	<input type="checkbox"/>	no	<input type="checkbox"/>

8. Are you interested in improving your ability to advise and signpost members on:

Basic Skills Qualifications	yes	<input type="checkbox"/>	no	<input type="checkbox"/>
Qualifications at level 1 or 2	yes	<input type="checkbox"/>	no	<input type="checkbox"/>
Qualifications at level 3 or 4	yes	<input type="checkbox"/>	no	<input type="checkbox"/>

9. If yes to question 8, what type training is likely to be of interest to you (please indicate)

The new unionlearn 5–day ULR course in “Supporting Members”	yes	<input type="checkbox"/>	no	<input type="checkbox"/>
The new unionlearn 2–day ULR course in “Supporting Members in Higher Level Learning”	yes	<input type="checkbox"/>	no	<input type="checkbox"/>
Undertaking an NVQ in “Information, Advice and Guidance”	yes	<input type="checkbox"/>	no	<input type="checkbox"/>

10. What would help you most to improve what you can do to support members with their learning needs?

Copy and paste these questions and your answers and email to jjackson@tuc.org.uk .

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at work?:

elsewhere?

(d) (FOR THOSE AWARE) Have you done any of these more advanced courses?

Please tick as appropriate

Yes

No

(e) If Yes: Please tell me what courses you have done at level 3 or above in the last 5 years

(f) IF No: Why not, what do you think are the factors preventing you from signing up to more advanced learning/training?