

TUC Education

Union Officer Training Review

Contents

about this review

- aims
- review methods
- the Open Learning Partnership

who are the union officers?

- variegation
- gaps
- gender
- age
- age and qualifications
- ethnicity
- employment status
- union roles

what do union officers do?

- survey data
- what does your job involve?
- changing role of union officers
- casework and teamwork
- technology – burden or bonus
- time management

training that would help

- priorities
- other topics

training evaluation

training and accreditation

course modes

conclusions and recommendations

target groups

professional development programme

content, knowledge and skills

updating programme

online support

further reviews

about this review

This paper has been produced to help TUC Education review its provision of training for trade union professional officers. TUC Education has been charged by the General Council with opening up pathways for union officers into a range of learning opportunities as well as giving officers the tools to do the demanding and difficult job they undertake on behalf of their unions.

The review was initiated by the TUC in the summer of 2004. In an interim report, the key role of union officer training was stressed:

Unions understand the importance of learning and skills, and the TUC National Education Programme is an essential part of staff development for all full time officers and for many others employed by a trade union. The programme provides a range of courses to develop and update the key skills and knowledge required by professional trade union officers and other staff working for trade unions.

TUC: officer training update 2004

A further factor in the review is the decision by the General Council to close the TUC National Education Centre (NEC) in London from autumn 2004. The NEC programme was honoured to the end of December 2004, and an interim officer training programme was publicised. The interim programme includes the full former NEC range of programmes, delivered in each region and through a national programme based in London.

the Open Learning Partnership

The TUC commissioned the Open Learning Partnership (OLP) to produce this report. OLP is an independent educational charity specialising in adult, trade union and community education. The review and report production were managed by OLP Chief Executive Doug Gowan.

All views and recommendations in this report are those of the authors and are not necessarily endorsed by the TUC.

aims

The interim programme will provide continuity in training for union officers and will strengthen the regional base for training. It will also offer officer updating in key areas such as the information and consultation regulations.

The interim programme however is just that. The TUC commissioned the review because of a recognition that a more fundamental look is required at the system of full time officer training. There is a clear need to look at the changing role of trade union professional officers within the context of new challenges, opportunities, and member expectations.

The key aim of this review is to provide findings and recommendations for the TUC, based on a wide range of input from unions and their officers. This review will thus provide valuable material to produce a revised system of union officer training by the Summer of 2005.

review methods

The review has been carried out by gathering the views of professional officers and their unions. The views sought covered the officers' job roles and their experience of and preferences for support through training.

In order to ensure consistency and to get broadly representative results, a number of different review techniques were used:

- union education officers were consulted about the review activities and about the detailed wording of the survey questionnaire
- survey questionnaires were distributed widely through TUC regional education contact lists and analysed centrally. Around 500 survey questionnaires were returned. The breakdown of returns by union is shown in Appendix 1.
- multi-union focus groups of officers were held in Scotland, Wales and each of the English regions

- unions were invited to request focus groups tailored to their own needs. Four unions took up this offer.

This variation in review methods allowed us to examine the same issues in different ways. The survey provides a broad overview of officer roles and training experience. The focus groups gave more personal insights into how union officers feel about the changing industrial relations climate and the support that they need. The individual union focus groups provided case studies to check whether findings from the multi union studies would be replicated in an individual union.

What struck the review team was that in spite of inevitable differences between unions and between regions, a number of strong common themes emerge. We examine these themes in the body of this report.

who are the 'full time officers'?

The first issue to examine is who are our target group – the 'full time officers'.

Twenty years ago it would have perhaps been unnecessary to ask this question. A full time officer was predominantly an area based union employee principally involved in negotiations with employers, supporting the union organisation, and handling a certain amount of individual casework that was beyond the capacity of local lay officials. Union officers were largely drawn from the body of union activists and in most cases would have held elected lay positions in the union that employed them. There were exceptions to this picture – for example direct recruitment of graduates was an entry route to some union officer posts, particularly in some public sector unions. The broad model however held true.

variegation

Over the last twenty years there has however been variegation in union officer roles, and in the entry routes to becoming an officer. There is evidence that this trend has accelerated in recent years.

Factors behind this wider variety of union officer roles include:

- appointment of officers specialising in organisation and recruitment in a wider range of unions. This trend has partly been prompted by the TUC Organising Academy, which has in turn provided a new entry point for

union officer jobs and for lay activists to switch from their original union to a new employing union. On the other hand a number of large unions have explicitly adopted the approach known as the 'Organising Model'. This model emphasises that the primary role of the officer is to build the union organisation at the activist level.

- expansion of the trade union learning agenda through initiatives such as the Union Learning Fund, TUC Learning Services, and lifelong learning and learning services structures within unions. This expansion has led to the appointment of specialist learning services officers and project workers, from a wide variety of backgrounds. Again, appointment as a learning services officer or project worker is proving to be a new entry route to traditional union officer posts. There is also a growing awareness that lifelong learning activities and the role of union learning reps – while worthwhile in their own right - have a key contribution to make to mainstream union work. In the report *Learning and Organising - union strength through the learning agenda* the TUC points out that trade union membership is on the rise in workplaces where unions are promoting learning and training at work. This report also reveals that unions enjoy a stronger standing in the workplace where they have reacted to the learning needs of the workforce. The perception of the union improves amongst all employees and the union-employer relationship improves in companies where learning reps play a strong role. There is thus a growing realisation that officers and staff engaged on the learning agenda need to be closely integrated into whole-union teamwork.
- creation of other specialist officer roles. These specialist roles include equality and diversity officers, casework managers (see next bullet point), and organisational development managers. The creation of the devolved administrations in Wales and Scotland has led to new national officer posts for those countries, dealing with the wide range of issues on which unions are consulted by the Welsh Assembly and Scottish Parliament.
- increased volume of personal casework, leading to reorganisations in several unions of the way in which individual cases are handled. The increased volume of casework is difficult to quantify without further research but was reported with great consistency at all the focus group

meetings and across most unions. Union strategies to handle the pressure of casework vary and are discussed later in this report. These strategies include the creation of a variety of new posts including casework managers, administrators and casework handlers. Another way of describing this development is that increasingly unions are seeing casework handling as a function involving several lay and professional union roles working together as a team, rather than a 'firefighting' operation which is purely responsive.

gaps

One consequence of this diversification of professional union roles is that a wider range of skills and knowledge gaps is emerging.

A 'traditional' union officer recruited within the union from the ranks of experienced lay activists for example typically needs a sharper understanding of employment law and complex negotiating issues, together with skills development in key areas such as campaign communications and media handling.

A union officer recruited through one of the routes now opening up will have other skills and knowledge gaps in addition. For example, an officer who started a union career as a learning project worker may have had little experience in chairing a meeting, speaking in public, or negotiating with senior managers. A second example is someone who started work as an administrator in a union office and gained experience of union work through being the first point of contact for members phoning through with problems and requests. In addition to limited legal knowledge and presentation skills, such an officer might have knowledge gaps in fundamental areas such as union democracy, decision making and policy development – which we might term basic trade unionism. Examples such as these were mentioned frequently in the focus groups, often linked to the suggestion that a key development should be a starter or entry course for new or prospective union officers, covering the issues mentioned here.

from the survey

gender

Over a quarter (27%) of the survey sample were female.

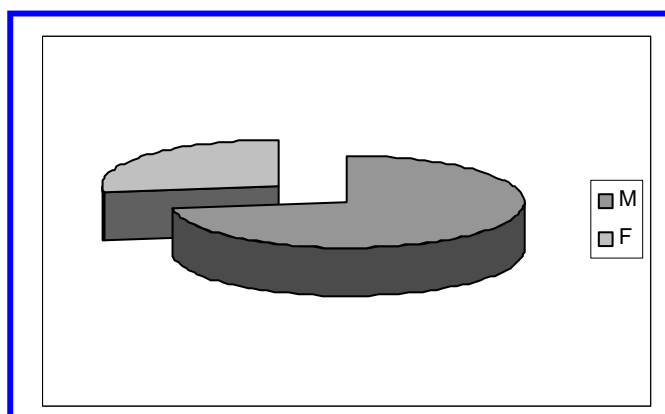


Chart 1 - gender

There is some evidence that this gender imbalance may be changing through the opening of new entry routes to union officer posts such as those described above. Learning project workers and administrative staff for example are more likely to be female.

age

Most union officers are in the 45-59 age group, although this is beginning to be balanced out by a younger cohort of organising and learning services specialist staff.

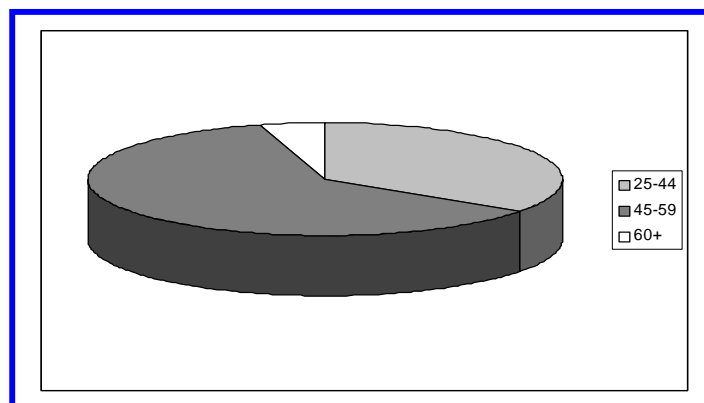


Chart 2a age bands

In the focus groups comments were frequently made about the number of union officers who would be retiring in the next few years and the need to replace them. These comments were often linked to the need to open up the new entry routes to union officer posts described earlier, and in some cases to the suggestion that new officer courses should be introduced or revived.

age and qualifications

In general the level of educational qualifications held by officers is high. Chart 2b shows a pattern dominated by degree and professional qualifications, although significant minorities have qualifications up to level 3 and ‘other’ qualifications.

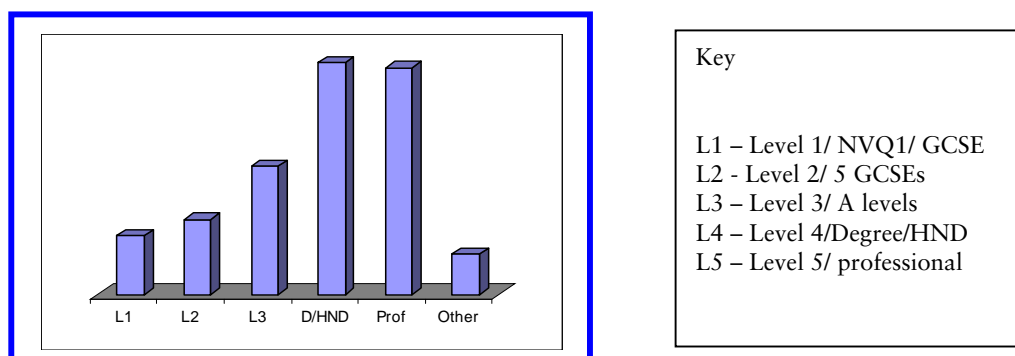


Chart 2b Qualification levels

We now look at whether there is a difference in qualification levels according to age group. Chart 2c shows the pattern for officers in the band 25-44, and 2d shows that for the band 45-59.

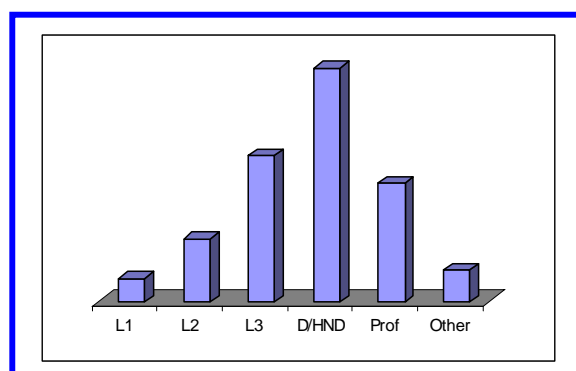


Chart 2c Qualifications 25-44 age band

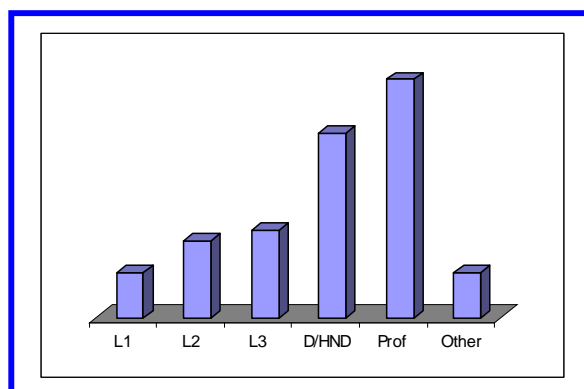


Chart 2d Qualifications 45-59 age band

The differences are clear. The older officers are significantly more likely to hold a professional level qualification. Many younger officers have degrees, but significantly more have qualifications up to level 3 than have professional qualifications. One consequence is that as the older group of officers begins to retire then not only the experience but also the average qualification level will tend to drop. This is again confirmation of the importance of examining the training and development routes for union professionals.

ethnicity

One in twenty five (3.6%) of respondents self-declared as being black or from an ethnic minority. Again this emphasises the importance of opening up a variety of entry routes to union officer posts.

employment status

Although the survey was targeted principally at professional union officers employed by their union, one in ten of the survey replies reported that the employer was not the union. This result is a reflection of the use in some predominantly public and civil service unions of the use of seconded officers. These seconded officers may carry out casework and conduct negotiations for example. Their workload is controlled by the union rather than their employer and thus there is no reason in principle to treat them separately in the survey results.

union roles

Chart 3 sets out the breakdown of union job roles reported in the survey

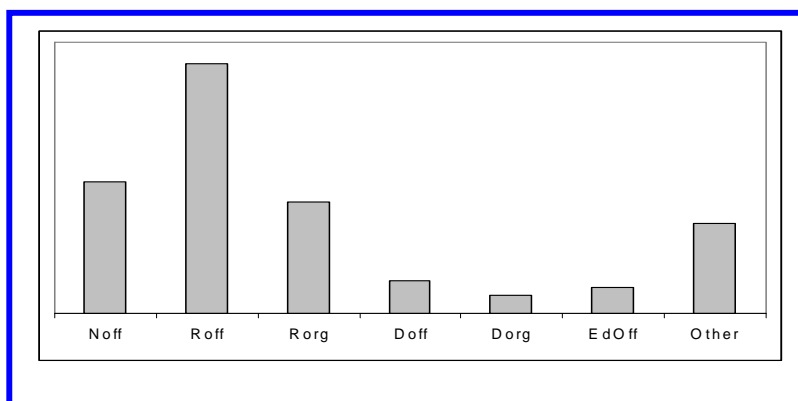


Chart 3 union job roles

Key

NOff – National officer	ROff – Regional officer
ROrg – Regional Organiser	DOff – District / Area officer
DOrg – District / Area Organiser	EdOff – Education officer
Other – Other job role	

Points to note from this data include:

- about half of the job roles are covered by the Regional/District/Area categories although a significant number of the responders described themselves as Regional/District/Area organisers
- the proportion of national officers seems high. This is partly explained by the expansion of this description to include recently designated national officers for Wales and Scotland
- there is also a significant response in the ‘Other’ category. A wide variety of other job roles were reported, including branch development officer, development manager, casework manager, equalities officer, learning services fieldworker, industrial relations officer, negotiations officer, regional officer, supervisory official, amongst others

What do union officers do?

We now go on to look at the key tasks performed by union officers, and how the balance of those tasks is changing within many unions.

Survey data

The survey asked officers to rate their involvement in a series of activities, on a scale from 'a great deal' to 'not at all'. Chart 4 shows the scored results.

What does your job involve?

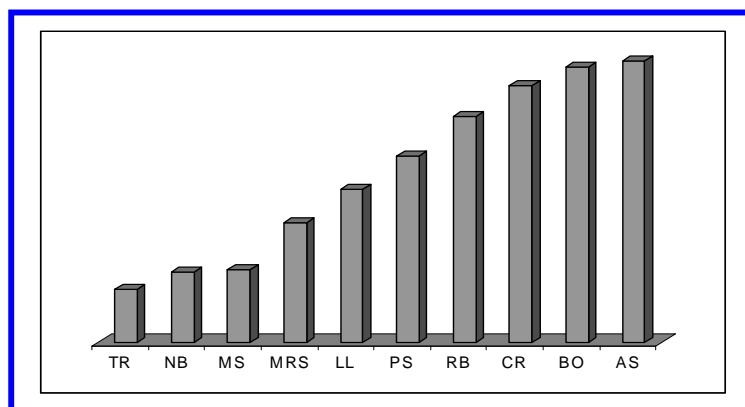


Chart 4 About your job

Key	AS –	providing back-up, advice and support on organising
	BO –	directly helping activists and branches to organise
	CR –	casework and representing members to management
	RB –	regional or local bargaining
	PS –	providing support eg training in organising or casework
	LL –	liaising with lawyers on legal cases
	MRS –	managing regional staff and/or resources
	MS –	managing national staff or resources
	NB –	national bargaining
	TR –	representing members at tribunals

The chart raises a series of notable points about the balance between organising, casework, negotiating, management and legal tasks for officers. There is little doubt that this balance has altered in recent years as a result of the changing environment and as a result of policy and strategic decisions by unions.

- there is a strong emphasis on organising, with the top two tasks directly linked to this theme. This emphasis has undoubtedly increased through

decisions by a significant number of unions to adopt the Organising Model and through the activities of the Organising Academy.

- casework and advocacy also feature strongly and are slightly more significant than regional bargaining. There is consistent evidence from the focus groups that for many although not all union officers the casework load is increasing. This issue is discussed further below.
- Tribunal work has dropped to the bottom of the listed tasks, and is less significant than liaison with lawyers in an officer's workload. This undoubtedly represents a major change over the last ten years. It is in part based on decisions by several major unions to require that tribunal representation is handled by the union's lawyers. The clear intention is that savings in officer time can be reinvested in organising work.
- Liaising with lawyers is however a significant task and may have replaced some of the tribunal work. Many officers in the focus groups commented on the increased importance of administrative systems to handle case paperwork, especially where a tribunal case might arise.
- Managing staff is more significant for officers with national responsibilities than for regional officers. Only a minority of regional officers spend much time on staff management. In part this may be because staff may not be directly line managed by a regional officer. There is evidence from the focus groups however that management issues are rising in importance, with a new emphasis in some unions on personal development planning and appraisal for all union employees. Developing teamwork between officers, staff and activists is coming to be seen as an essential ingredient for success in a range of union activities.

Changing role of union officers

The focus groups provided an opportunity to explore issues connected to the changing role of officers.

Many officers commented on the increased importance of organising and the adoption of the Organising Model. Some saw the need for closer links between

dedicated officers and staff working on organising and learning services projects and regional industrial relations officers, emphasising teamwork within the union.

While the Organising Model stresses the need for lay activists to take the primary role in member representation, a constant theme was that in many workplaces this has only been partly achieved and thus casework and advocacy remain major elements in an officer's work. Factors behind this include an influx in some areas of new or less experienced representatives, reluctance amongst some lay reps to handle cases that could end up in a tribunal, and the growth of single member sites in part linked to the option in many unions to be able to join the union through its website.

A frequent theme commented on by the officers was the rise in member expectations of service from the union. These expectations are seen as linked to a number of factors including:

- the rise of the 24/7 culture in UK society
- customer service standards being adopted more widely – members following these standards expect the same from their union
- widespread awareness of the legislation on the right to be represented
- the revolution in personal communications. All members have mobile phones and many now have email, increasingly at home as well as at work. One officer commented that members now regularly email in queries and requests – and some will phone in an hour later to ask why their email has not been answered.
- the 80/20 rule – 80% of member cases are handled quickly but the 20% of difficult cases take up all the time.

Casework and teamwork

The survey data documents how significant casework is for union officers while the focus groups suggest it is rising. Faced with this pressure, unions are adopting

a number of strategies, in addition to promotion of the Organising Model, which impact on the role of officers. We briefly describe these strategies below.

Casework officers. A number of unions are designating casework officer posts and designing training programmes for them. Such posts may also be seen as feeder posts for officer jobs.

Staff roles. Several unions are re-examining administrative staff responsibilities as first step case work handlers. Training and development programmes are being planned or provided in some unions to help staff take on wider responsibilities to handle the 80% of straightforward cases and recognise the 20% of difficult ones. One union has abolished the distinction between ‘officer’ and staff posts and now distinguishes between mobile and office-based staff.

Case administration and paperwork. Many officers commented that paperwork requirements for case work have become more demanding, partly as a result of tribunal regulations. Some unions are encouraging officers to delegate casework progress chasing to office staff. One union is introducing a computer-managed casework management system that allows and at certain points requires input from the various parts of the union team – lay officials, administrative staff, casework officers, and if necessary the union lawyers.

Lay official training. Several unions are revising activist training programmes to include a stronger element of advocacy and casework.

Teamwork – the whole union approach. Many officers commented that building teamwork is a key aspect of tackling the problems of a rising casework load. Several unions are introducing combined staff and officer training and looking at ways in which tasks can be delegated. Many officers commented that people management and staff development needed to be recognised as a central part of their role.

Technology – burden or bonus?

The rapid growth and development of computer and mobile communication technology is clearly having an impact on the work of union officers and staff.

We have already seen how email and mobile phones are fuelling an increase in queries and requests from members and a raised level of expectation about the rapidity of the union response. Mobile technology is also increasing the availability of officers while they are out of the office on union business.

The response of union officers to mobile and computer technology is varied, in two ways. First, there is a wide range of attitudes to the use of mobile technology. Some officers value the ability to deal with email and messages on the road, since in this way they can avoid a backlog of work at the office and respond to problems quickly. On the other hand there are officers who see continuous availability as a burden and a problem for their time management.

The second and related issue is the officer's competence in and attitudes towards use of technology. Here the range is very wide and there is no baseline. There is a group of officers who are highly competent technology users who have set up systems to work for them and help them to manage their time. These officers make intelligent use of techniques such as mail forwarding, auto-replies and template messages and letters. They often also set up their systems so that staff and co-workers can filter out and deal with messages within their competence. At the other end of the range there are officers who see technology as a diversion and still prefer for example to handwrite letters that are then typed up by a secretary. In the focus groups there were frequent suggestions for training and support in what one officer called 'ICT survival skills' – not so much training on software packages, but on how to make computer systems work for you and help you manage your workload.

Time management

It is clear from the focus groups that trade union officers work in a pressurised environment. We have noted that in some ways pressures appear to be increasing – for example because of the higher priority given to organising and rising member expectations and demands for support. In the focus groups many officers gave the view that time and workload management was now a major issue for them. Time and workload management is seen as being linked to a number of issues we have already noted in this report:

- the use or failure to use the potential of computer and mobile technology to manage the communications workload

- the degree to which there is a team approach within the union office, with delegation of duties and staff development being managed and encouraged
- the development of effective systems of casework and administration to handle the bulk of queries and requests

Many officers took the view that training and support in time, workload and stress management is now a priority, alongside training in people management, delegation, and staff development.

Training that would help

The survey asked officers to rate training topics on a range from ‘very useful’ and ‘quite useful’ to ‘not much use’.

Here are the weighted results, with ‘very useful’ scoring 2 , ‘quite useful’ scoring

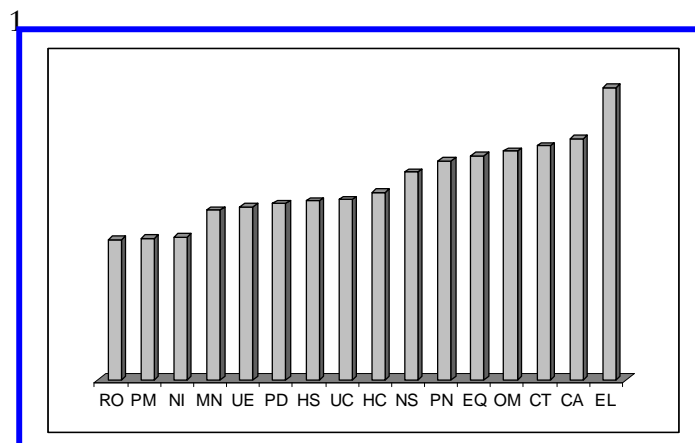


Chart 5 preferences for training

Key	EL – employment law	CA – campaign techniques
	CT – Communication techniques	OM – organising methods
	EQ – equality	PN – pensions
	NS – negotiating skills	HC – handling casework
	UC – using computers	HS – health and safety
	PD – policy development	UE – union education
	MN – management	NI – national and international issues
	RO – running an office	PM – project bids and management

For comparison, Chart 6 shows only the ‘very useful’ scores for each training topic.

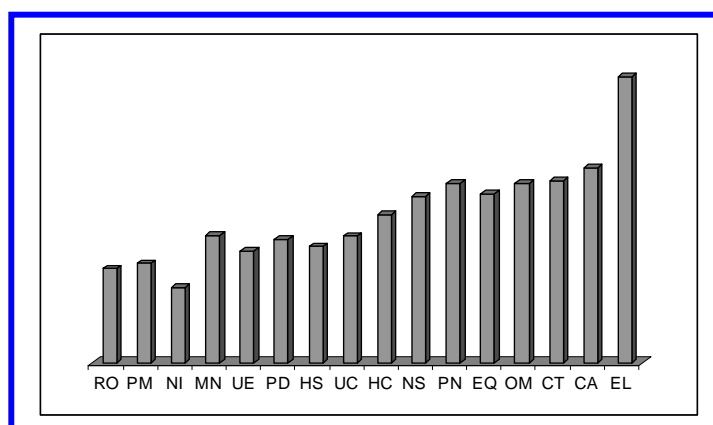


Chart 6 very useful topics

The two charts show a similar pattern, although Chart 6 shows stronger preferences for employment law, pensions, project development, and management than the weighted results in Chart 5.

The strong preference for employment is understandable given the recent and impending changes in employment and work related legislation. Many officers in the focus groups expressed the wish for some form of coherent and continuing updating system through training and briefings.

The high score for pensions also reflects union anxieties over threats to pension schemes and scheme closures.

There are notably strong responses to campaign and communication techniques, and to organising methods. Equality training is also highly rated. Officers are thus identifying training needs in areas which their unions are clearly prioritising.

The strong support for training in management is in part a reflection of trends identified earlier for more emphasis on people management, team working, staff development, and a whole union approach.

Priorities

To help focus on the officers' key priorities, the survey asked respondents to name their top three training priorities. The results are shown in Table 1. 'Weighted rank' reflects the weighted score for first, second and third choices. 'First choice' shows the rank order just for the first choice from three. Topics which are ranked higher as first choices than the weighted rank are shown in **bold**.

Topic	Weighted rank	First choice
Employment law	1	1
Organising methods	2	2
Negotiating skills	3	3
Communication techniques	4	6
Equality	5	4
Management	6	5
Pensions	7	8=
Campaign techniques	8	12=
Casework	9	7
Policy development	10	10
Health and safety	11	11
Using computers	12	8=
Project bids and management	13	12=
Union education	14	12=
Time management	15	12=

Table 1 Top three training priorities

Points to note from this data are:

- continuing dominance of employment law and organising methods in the ratings
- strong first preferences for equality, management, casework, computers, project bids and union education
- time management – not listed as a pre-set choice in the survey – emerges strongly as a training need

Other topics

The 'top three training needs' question on the survey allowed officers to write in additional topics not pre-coded on the survey. In Table 1 we saw how Time Management entered the top fifteen training needs.

It is worth examining the other topics written in by several officers. These topics were:

- Advocacy
- Finance
- Training
- Pay
- Media
- Tribunals
- Human resource strategies

‘Advocacy’ is an aspect of personal casework although it may also be used to mean tribunal case presentation.

It was unclear from the responses whether ‘finance’ and ‘training’ referred to negotiating issues or internal union functions.

Again we note that ‘tribunals’ did not reach the top officer training requests for reasons outlined earlier.

‘Human resource strategies’ was a topic mentioned frequently in the focus groups. Many officers feel that sophisticated human resource management techniques are penetrating further into the world of work. They expressed a need to be briefed on the aims and principles of these techniques and on appropriate trade union responses.

Training evaluation

The survey asked officers to rate training they had received on a scale from ‘very useful’, partly useful’, ‘not useful’, and not received.

Chart 7 shows the results: each topic rated as a proportion of its potential maximum score.

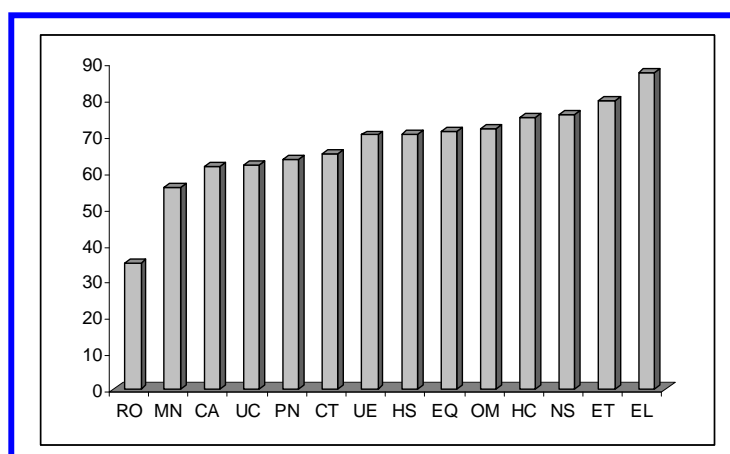


Chart 7 Training evaluation

Key	EL - Employment law	ET - Employment Tribunals
	NS - Negotiating skills	HC - Handling casework
	OM - Organising methods	EQ - Equality
	HS - Health and safety	UE - Union education
	CT - Communication techniques	PN - Pensions
	UC - Using computers	CA - Campaign techniques
	MN - Management	RO - Running an office

The overall picture is one of satisfaction with the usefulness of training, with most topics scoring over 60% of their potential maximum..

Employment law again comes out top. In the focus groups frequent comments were made about the value of employment law updates and briefings, carried out by the TUC, their own union, or through ACAS and other responsible bodies. Suggestions were often made about the need for more continuity and in these updates, and possible coordination between the TUC and ACAS to draw up an annual schedule that officers could get into their diaries.

Employment tribunal training gets a high score even though as we have seen it has dropped out of most officers' priority lists. Handling casework and negotiating skills also get notably high scores.

The two under-performing areas are management and Running an Office. These results are partly explained by comments on the focus groups that some management training had been too generic and not union related. An example given was telephone training that had failed to deal with the key issue of distressed, angry or difficult members. Given that management training has been highlighted as a key issue, how to make this training relevant to union needs should be examined in some detail.

Training and accreditation

In addition to looking at training needs and content, the survey and focus groups also looked at issues of the accreditation of training and modes of delivery. We now look at the first of these issues.

The survey asked officers to rate their agreement or disagreement with four statements:

- S1 I would like my training to lead to a recognised qualification
- S2 Practical relevance to my job is the most important factor in training
- S3 I prefer a comprehensive, all-in-one training programme
- S4 I prefer a flexible programme in separate parts

Chart 8 shows the weighted scores.

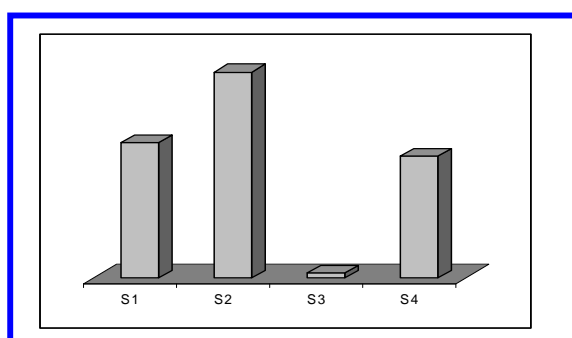


Chart 8 Training and accreditation

The chart shows strongest support for S2 – practical relevance is the most important factor in training. In the focus groups where officers were critical of training their dissatisfaction was often linked to lack of relevance in training sessions and training that was not clearly linked to the trade union role. Officers were insistent that what they wanted was training that gave them immediate benefit through ‘really useful’ knowledge and skills.

In second place comes the desire for training leading to a qualification, although in the focus groups the point was often made that this should be an option and not a requirement. A route to a qualification is thought to be of particular value to people on the new access routes to officer jobs outlined earlier in the report – administrative staff taking on casework, specialist organisers, workers on lifelong learning projects.

Flexible training programmes are also rated highly. Many comments were made in the focus groups that ‘one size does not fit all’ and that training programmes for officers needed to recognise the pressures they face.

On the other hand, while there is a small group of supporters of ‘comprehensive all in one training programmes’, they are almost completely balanced by opponents of that approach.

Course modes

We now look at officer preferences for mode of provision. The survey asked for ratings of online courses, national and local courses, and residential and weekend courses. The survey results for positive preferences are shown in Chart 9a and for negative preferences in Chart 9b.

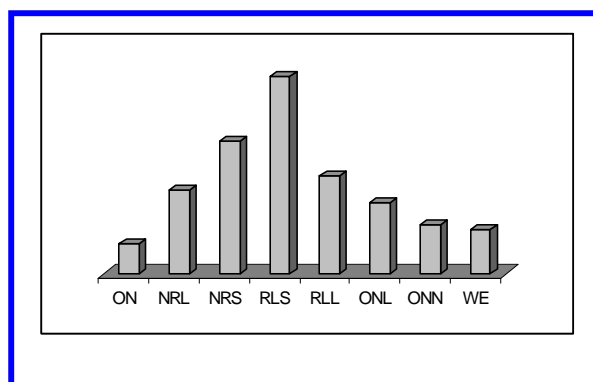


Chart 9a Positive preferences for mode of provision

Key	
ON	Wholly online course
NRL	National residential course 4-5 days
NRS	National residential course 1-3 days
RLS	Regional course 1-3 days
RLL	Regional course 4-5 days
ONL	Mixed online/local course
ONN	Mixed online national course
WE	Weekend course

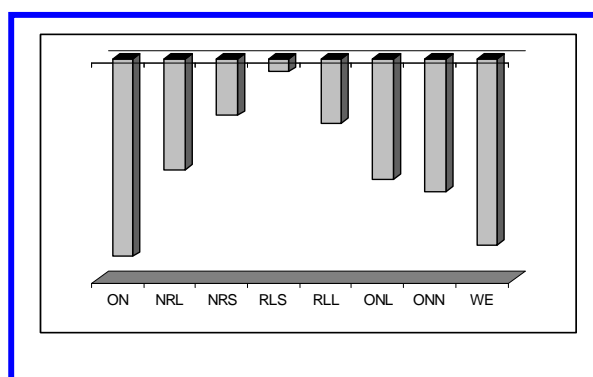


Chart 9b Negative preferences for mode of provision

All modes of provision have some degree of support. There is a clear preference for short regional courses (RLS) and shorter courses generally.

On balance there is a negative rating for residential courses, and strong dislike of weekend courses. Views from the focus groups on residential courses were mixed, with some officers welcoming the chance to get away from immediate pressures, and other officers arguing strongly that care commitments made it impossible for them to attend.

There is little support for wholly online courses, and strong negative reaction to this type of provision. In the focus groups however some support was expressed for online systems which could support training – for example online course materials, updates, FAQs and discussion boards.

Officers in the focus groups often expressed the view that whatever the mode of delivery courses should be paced correctly. They were critical or provision that was too 'slow' or did not start on time. Another concern was that programmes should be viable – some officers commented that cancelled courses caused problems when they had made considerable efforts to book a slot in their diaries.

Conclusions and recommendations

In the part of the report we summarise conclusions from the review and make initial recommendations to the TUC.

Union officers value the training they receive and welcome the role played by TUC education.

They have clear although mixed views about their needs and priorities. The needs officers express are closely linked to changes in the working environment. Those changes include the adoption of the Organising Model, rising pressure of member expectations and resulting casework, continuing developments in employment law, and challenges from new human resource management techniques and their extended adoption.

Target groups

There is now probably a greater variety in the roles of union professional officers and staff that at any previous time. There are also new entry routes to traditional union officer posts, including academy trainees, project workers, organisers and administrative staff. Many unions now recognise the value of a team-working or whole union approach to union core activities and campaigns.

There is a strong case for the TUC officer training programme to be extended to cover these wider groups. Target groups for particular courses within the programme would then be defined by union function rather than formal status. To give an example, courses on casework and advocacy would be designed to meet the needs of new or prospective officers, dedicated casework officers, and union staff extending their duties to include casework support.

Recommendation 1: The TUC officer training programme should be extended to other union professionals and staff, based on their function or potential function in the union

Professional development programme

While there is little support for professional officer training to be organised as a comprehensive all in one course, there is demand for a coherent, consistent and flexible programme of courses. This programme should cover the key functions of union professional officers, and make provision for updating on key topics.

There is also strong support for accreditation of the programme and links to recognised qualifications to be an option, although not a requirement. The option of a route to a qualification is thought to be particularly valuable for staff and project workers and union lay officials who are potential union officers. Accreditation of Prior Learning should be investigated as part of the route to a union professional qualification.

To emphasise this opportunity, the modular series of courses and briefings could be recast as the TUC's 'Union Professional Development Programme'.

Recommendation 2: Accreditation of the modular programme should be sought by the TUC, together with links to recognised qualifications at an appropriate level. Accreditation should be optional for participants.

Recommendation 3: The officer programme should be relaunched as the TUC Union Professional Development Programme.

Content, knowledge and skills

There is broad agreement on the skills and knowledge that should form the core of a union professional development programme. Employment law is fundamental, as is some knowledge of health and safety and pensions. Equality and diversity issues are fundamental. An understanding of human resource strategies continues to grow in importance, as does an appreciation of the importance of the learning and skills agenda for both industrial relations and organising.

Core skills include advocacy and casework handling, communicating and campaigning, planning and running learning programmes, and using the media. Participants with limited experience will often need training in public speaking and chairing skills. Computer skills are important and it has been suggested that a baseline of core ICT skills should be established. The emphasis in ICT training should be re-examined to focus clearly on union functions and problem solving – such as using time effectively, building union teamwork, and communicating and campaigning effectively.

Training in management skills and knowledge should be reviewed and strengthened in the programme. The emphasis should reflect the need for people management skills including delegation, team building and personal development. Union professionals also need support in effective time management.

There are specialist needs we have identified in a number of areas. The growing volume of areas for consultation in the four home countries together with major changes in national and regional industries and services is leading to an identifiable support need in policy formulation and development. And project management, monitoring and evaluation has emerged because of funding initiatives and opportunities.

It is not possible in this review to prescribe the precise course structure and content of the Union Professional development Programme, however the issues raised here provide some clear pointers.

Recommendation 4: Detailed module content of the Union Professional Development Programme should be designed taking into consideration issues raised in this review.

Updating programme

There is strong demand from union officers for their knowledge to be kept up to date through short briefing programmes. Officers rate highly the briefings provided by their union, the TUC or by bodies such as ACAS. They see these programmes as a quick way of updating their knowledge and also a valuable opportunity to swap notes with colleagues from their own and other unions.

There is a strong case for updating programmes to be built more consistently into the regional programmes, for example by advertising an annual programme so union professionals can get the dates into their diaries. There is also a case for coordination with bodies such as ACAS to avoid duplication and make the best use of available time.

An issue the TUC will have to consider is how a continuing updating programme can fit with the modular core key skills and knowledge programme and accreditation arrangements, or whether in practice this is too difficult to achieve.

Recommendation 5: The TUC should plan a coherent annual updating programme either alongside or with the Union Professional Development Programme and discuss how this could be coordinated with appropriate third parties, in particular ACAS.

Online support

Although many union professionals believe that online systems will grow in importance in union work, there is only modest support now for training to be delivered through elearning. There is greater support for elearning elements to be combined with face-to-face sessions in blended learning. And there is also support for online systems to play training support roles – for example through a website containing core materials, frequently asked questions, and updates. A development of these kinds of services would help to emphasise the coherence of the programme, keep it up to date, and improve quality control.

Recommendation 6: A online support system should be investigated by the TUC for the Union Professional Development Programme. Once this is established the TUC should pilot a small number of courses offered as blended online/face-to-face learning.

Further reviews

This review has provided valuable insights into the changing roles of union professionals and their support and training needs.

The TUC should consider how the review process could be embedded into the professional development programme. Continuing feedback from union professionals will help to keep the programme relevant and provide input to continuous quality improvement.

A simple way of achieving this aim would be to manage a rolling survey of programme participants, using the current survey as a baseline. The rolling survey would help to spot and verify trends and provide officer commentary on how far their needs were being met.

As with the current review, the survey could be accompanied by occasional officer focus groups, which might perhaps look at specific topics rather than the whole range of professional duties. To economise on time and expense, the focus groups could be held with participants on national or regional residential courses.

Recommendation 7: The review process should be embedded into the professional development programme through a rolling survey. The TUC should also consider a planned occasional use of topic-specific focus groups.

Appendix 1
Survey responses by union

ACCORD	1
ACM	2
AEP	1
AFA	1
AMICUS	39
AMO	3
ANGU	1
ASLEF	2
ATL	5
AUT	3
BALPA	3
BDA	2
BECTU	13
BSU	2
CONNECT	3
CSP	2
CWU	4
CYWU	2
EQUITY	2
FBU	6
FDA	1
GMB	37
GPMU	8
MU	1
NASUWT	6
NATFHE	5
NUM	2
NUT	12
PCS	12
PROSPECT	20
RMT	2
SCP	1
SOR	2
TGWU	25
TSSA	14
UCATT	6
UNIFI	4
UNISON	38
USDAW	15
	308
unstated	165