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# Integrating union learning and organising strategies

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Unionlearn commissioned this research paper to inform its strategy on learning and organising: it is not a statement of TUC policy. Unionlearn is the TUC organisation that supports union-led strategies on learning and skills. It helps unions to open up learning and skills opportunities for their members and also provides trade union education for union representatives and professionals.

#### **About the author**

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# Foreword

This research, which the Working Lives Research Institute undertook for unionlearn, shows how union learning strategies can not only recruit new members, but also generate new activists and revitalise workplaces and branch organisation.

It reveals how unions are more than ever consciously promoting a formal relationship between learning and organising by integrating union learning representatives (ULRs) into wider union structures and treating union learning project workers as union organisers.

TUC Education and union training programmes have helped support this trend by ensuring that there is a union learning element in all activist training and a strong organising element within ULR courses.

The case studies in this paper exemplify good practice at workplace and branch levels within a diverse range of sectors, highlight how learning has played a key role in union organising campaigns and show how successfully it has been linked to a wider union vision of learning to enhance personal as well as professional development.

There is no single way for unions to use learning to revitalise their organisation, as this research shows. We hope that this paper, along with the resource pack *Organising for Learning*, will help all unions develop and deliver effective learning and organising strategies.



**Liz Smith**  
Director, unionlearn

# Abstract

Previous research has picked up some concerns about the place of union learning within unions: on the one hand, some union officers and activists have worried that union learning might develop separately from core union activity, while on the other hand, some union learning activists and project workers have complained that ULRs are not being integrated into the wider union.

This research suggests that there has been a shift in the role of union learning: more and more unions consider union learning a crucial component of the wider organising agenda and consciously promote the relationship between learning and organising at national union level.

The case studies outline five key themes:

- Learning can be a key strand in union organising campaigns.
- Learning can revitalise union activity because it requires strong workplace/branch organisation.
- Unions are integrating learning into wider union structures and agendas.
- Although union learning may be related to employer and government skills agendas, it also goes beyond individual employability.
- Union learning offers a path to union activism.

# Summary

The research suggests that unions are increasingly promoting a relationship between learning and organising at national union level. Unions are bringing learning and organising together in their departmental structures, or developing links between separate learning and organising departments around specific campaigns. Some unions are also integrating the two at regional union level by placing Union Learning Project Workers in regional organising teams.

Another trend is to designate Union Learning Project Workers as organisers, to reflect how they are organising around the learning agenda.

Union education and training is also developing the link between the two functions, with learning reflected in activist training and organising in ULR training.

## The case studies highlight five key issues:

- Learning has become a key strand in union organising campaigns: Unite–T&G section’s Justice for Cleaners campaign has focused the teaching of English for Speakers of Other Languages (ESOL) to migrant workers around workplace issues and employment rights; the CWU at BT’s Magna Park site has successfully used learning to engage agency workers who had previously been impossible to organise.
- Branches (eg, Unite–Amicus section at NHS Tayside Trust) have linked learning to organising around an issue at work, but have also focused on the learning and training needs of existing representatives in order to build branch organisation. In this context, learning has moved beyond recruitment and retention, and is closely related to the strength of the union in the workplace. Similarly in the case of ATL, learning has been part of the revitalisation of union organisation in London.
- Unions are addressing concerns about the integration of learning into wider union structures, agendas and organisation. In the Department of Work and Pensions (DWP), PCS has introduced a number of measures to ensure ULRs are part of the branch and that learning is a collective bargaining issue. Crucially, the branch has taken small but significant steps to remove the barriers to participation in the union faced by ULRs, which has implications for union activity elsewhere.
- Unions are adopting a vision of learning that goes beyond individual employability. In some cases, learning is linked to employer skills frameworks, (eg, the FDA in the Civil Service), and to members’ professional development (eg, ATL). Yet here and elsewhere, unions are also promoting learning for personal development to increase confidence and for empowerment (eg, UNISON at Exeter University).
- Learning is offering a path to union activism. The case studies provide examples of where learning has encouraged new activists into the union or re-engaged those who have been active in the past.

# Introduction

Lifelong learning is a concept that may have developed in response to globalisation and so-called 'post-Fordist' changes in work organisation and management, but it is also rooted in ideas about developing civil society and democracy (Faure, 1972). Workplace learning is an issue which is similarly contested. For some, it is merely the promotion of an individual's employability, but for others, especially inside the trade union movement, its capacity to stimulate personal education and development is based on wider social and political values. In addition, some believe lifelong learning may have the potential to reinforce the historical role of unions in political education, encouraging not only active citizenship and democratic engagement, but also union activism (Forrester, 2006).

Several commentators have suggested that union learning has the potential to support union renewal in a range of different ways (Wallis et al, 2005; Forrester, 2004). Some see union learning as largely dependent on partnerships between employers and unions, representing a consensual and integrative issue for engagement where all parties stand to gain (eg, Stoney, 2002; Clough, 2004; Wallis and Stuart, 2004). Others focus on its potential for union organising: an early TUC Task Group on the issue argued union learning could not only add value to the union card by offering new opportunities to members and potential members but also contribute to "wider union strategies for ... organisation at the workplace" (TUC, 1997, p6). However, others disagree. McIlroy has cast considerable doubt on the role of trade unions in workplace learning, characterising it as "a rediscovery of the unions' public administration function" and arguing that it is "an implausible path to union revitalisation" (McIlroy, 2008).

Previous research by the author (Moore and Wood, 2007) explored strategic attempts by unions to link union learning with recruitment and organising, and the dynamic between union learning and organising within unions in terms of structures, training, communication and relationships at both officer and lay levels. It asked whether unions were evaluating union learning in terms of recruitment

and organisation, and how they were doing so. It showed that wider measures of workplace organising as a result of union learning were not widespread, although union learning officers were convinced of its potential for recruitment and encouraging activism. It also showed union learning officers believed union learning boosted workplace recruitment and helped generate new activists, while organising officers appeared less convinced about the relationship between organising and learning and some even perceived a possible tension within union learning between promoting individual employability and the wider collective role of unions in the workplace.

This new research builds on that earlier work in order to:

- Identify how far unions at national level have adopted and developed strategies to evaluate the impact of union learning on recruitment, organisation and activity, including collective bargaining.
- Explore how these strategies are being implemented at workplace level and/or informed by workplace practice, and identify how union learning can enhance union organisation and activity.
- Begin to identify how unions can develop measures of the organising outcomes of union learning and to set out the components of what would constitute good practice in this area.

# Methodology

The research focuses on case studies from unions of different sizes which have taken specific initiatives to develop the relationship between learning and organising in a range of sectors and occupations. The unions are: teaching union ATL; postal/telecoms union CWU; Civil Service union FDA: public/commercial services union PCS; public sector union UNISON; and private sector union Unite (at the time of the research still operating in two sections, Unite–Amicus section and Unite–T&G section).

The first part of the research, based on interviews with national officers responsible for union learning (or learning and organising where appropriate), identifies national union strategies to link learning and organisation and evaluate outcomes. The hour-long interviews were based on semi-structured topic guides and were recorded and transcribed.

The second part of the research is based on case studies based on interviews with:

- six union learning project workers;
- two full-time officers responsible for the workplace or organisation;
- one branch officer;
- 11 union learning reps (ULRs); and
- two workplace representatives.

These 45-minute interviews aimed to capture union learning activity at workplace or branch level and were based on a semi-structured topic guide and were recorded and transcribed.

# National strategies

## The relationship between learning and organising at national level

The interviews with national union officers suggest that a number of unions are now consciously promoting a relationship between learning and organising at national level. In five of the unions, learning and organising are situated within the same department at national level.

- The Association of Teachers and Lecturers (ATL) had placed its Union Learning Fund (ULF) projects within the Recruitment and Organisation Department from the start.
- The Public and Commercial Services Union (PCS) had created a single department covering learning, union education and organising in 2002, covered by an Organising and Learning Services Committee.
- UNISON created its Learning and Organising Services Department to co-ordinate trade union education and lifelong learning opportunities for members, as part of a drive to meet its national objectives on recruitment and organising, which include learning.

The First Division Association (FDA) treated its ULF project worker as part of the union's organising team.

In the other unions, learning and organising remain in separate departments and links are more informal or specific to particular campaigns.

- The interviews with respondents suggest there is a second trend, which is to designate ULF project workers as organisers around learning.
- ATL calls ULF project workers Learning Organisers.
- Unite–T&G section calls ULF project workers Union Learning Organisers who are responsible to the regional secretaries so they can support specific organising campaigns locally.
- Unite–Amicus section calls ULF project workers Regional Learning Organisers who are responsible to the head of the National Learning Department, reflecting a concern to protect their specific role and not treat them as “another pair of hands.”

- UNISON calls ULF project workers Regional Learning and Development Organisers, reflecting their role of recruiting ULRs, building branch capacity for learning and promoting the role of Lifelong Learning co-ordinators in branches. Integration at national level is reflected regionally – they are managed by Regional Heads of Organising and located in the organising teams in their region:

- “They’re not an add-on, an additional thing: they’re part of the organising team. They work with target branches across different sectors. Their role is to go in, sell learning to the branches basically, sell the organising benefits, recruit ULRs, get them onto training, support the branches in negotiating with the employers, organising and so on: it’s absolutely an organising post – but [centred] around learning.” (National Project Manager, UNISON)

In the Communication Workers’ Union (CWU), a new post designed to promote best practice on the links between learning and organising will focus on grass-roots concerns. In PCS, the main work is done at a regional level and regional learning services officers and learning project workers work closely with the organisers (eg, by helping with recruitment events) and both identify learning needs.

A number of the unions have taken measures to ensure that ULRs are integrated into the wider union. In PCS, the key task regionally is to build union organisation through identifying representatives and building the representative base. Initially, union learning was organised on a national basis with ULRs trained through head office. ULRs could nominate themselves, which meant they existed separately from branch structures. Now PCS aims to promote integration and ULRs have to be nominated by branches and a new branch learning co-ordinator role has been created to link the learning agenda more closely to the branch agenda. In UNISON, the ULR role is now defined in the rulebook and branches have elected lifelong learning co-ordinator posts – branch officers who lead on learning and organising. Unite–Amicus section is encouraging ULRs to push policy through union structures – this

year's policy conference passed three motions on lifelong learning designed to further embed the agenda within the union:

*“ULRs are firmly part of the organisational structure and the workplace structure – they're not seen as separate and isolated. What we're saying to our activists is: 'If you're serious about trying to ensure that this becomes core activity for the union then it needs to come from you; it needs to come from the activist base. You need to be pushing policy motions through the branches, through the regional committees, so that they get adopted at national policy conference and then become policy of the union and as policy of the union it has a much stronger foundation'.”*

(Head of Lifelong Learning and Officer Training, Unite–Amicus section)

Similarly, unions are pushing for learning to become part of the collective bargaining agenda. Unite–T&G section engages with companies nationally and has umbrella agreements on lifelong learning, with details worked out at workplace level. These aim to ensure workers have time off to learn reflected in their contract of employment; learning is then part of the collective bargaining agenda and subject to annual negotiations. Unite–Amicus section sees learning as the basis for “genuine partnership” in the workplace with “more enlightened employers” seeing it as a positive agenda for working jointly with trade unions. Having had an impact in areas where industrial relations have previously been difficult, it is now becoming integrated into the union's industrial agenda:

*“A learning agreement is a collective agreement in the same way as any other agreement and the full-time officer should be comfortable with negotiating them with the help of Regional Learning Organisers because clearly they have expertise in the field. We insist that all learning agreements are signed off by the appropriate regional officer so that they're seen as collective agreements and not something separate to what*

*they do in their day jobs – or what they may see as their day jobs.”*

(Head of Lifelong Learning and Officer Training, Unite–Amicus section)

The relationship between learning and organising is also developed through union education and training. ATL emphasises the integration of ULRs into the union: as part of their training, ULRs are expected to meet their branch officers to find out more about their branches; and reps are also encouraged to attend a Learning and Organising course after their initial training. In Unite–Amicus section, Regional Learning Officers attend a two-day course on organising skills. In Unite–T&G section, the organising model is built into ULR courses and ULRs may also attend the union's Overcoming Barriers to Organising course. Since both PCS and the CWU locate learning and education in the same department, they are able to ensure that there is a learning element in all activist training, as well as a strong organising element on ULR courses. The CWU has a particular focus on emphasising that ULRs are part of the union structure:

*“We say from the start of the course: 'This is a branch structure, this is the union structure, this is how you influence it, and this is where you can get your support from'. One thing that managers do – they take 'union learning reps' and change them to 'learning reps' – a way obviously of reducing the union role ... and then they're being told: 'You're a new kind of rep and everything's nice and cosy' and all that sort of business. What we're saying to branches is that the best way forward is to ensure that you've got a learning rep on your branch committee. In that way, your learning rep is aware of the industrial issues that are going on and your industrial reps are aware of what's going on through learning and what the potential is. This has come from the ULRs themselves. We did a survey on the support that ULRs needed and one of the things that came out clearly was that they need reps skills: they need negotiating courses, they need the tools to go in and do what they're expected to do.”*

(National Project Manager, CWU)

UNISON was reviewing its activist materials to ensure they addressed Skills for Life issues, and the PCS organising and learning teams work together to ensure materials reflect both strategies. Unions also use specific events to mainstream union learning. ATL recognises that ULR activity will reflect how ULRs are received by the branch and will depend on branch officers recognising the link between learning and wider union activity. In 2007, the union's national union learning conference comprised half ULRs and half branch officers, which was seen as "a bit of a watershed – it did get people seeing that these two things were linked together". The ATL's termly branch secretaries' conference has also had workshop and plenary sessions on union learning. The CWU has run presentations on good practice from union learning at its annual conference. Most unions disseminate success stories from union learning through their publications.

Despite reporting steps to build the relationship between learning and organising, at least one national learning officer suggested that there were still some organising officers who looked on learning with suspicion:

*"There doesn't appear any way that the learning and organising agenda has been promoted to the organisers. It's certainly been promoted to us – we can't move for it – but whether it's been promoted across the board is another matter. And so we're treated with suspicion to a certain extent. We are taking steps to try and resolve that and we've had some positive meetings, and we've got some organisers who have come from an industrial background, certainly within the union, who see the benefit. It's not like saying we're in two totally separate camps – we're moving closer together, but there are some residual suspicions."*

(National Learning Officer).

## The wider impact of union learning

All national officers interviewed acknowledged the potential of union learning for recruitment and retention, although a number noted that this was difficult to measure. Some officers characterised union learning's dual role, firstly as part of the union's offer to members in terms of a membership service and secondly, as a result of this, its contribution to the recruitment and organising agendas:

*"It's an opportunity to offer something, a tangible benefit to the union's membership, which is perhaps more in keeping with our traditions than cut-price insurance: it's definitely an opportunity to get to new groups of workers."*

(National Project Manager, CWU)

In a number of unions, learning is linked to professional development for members:

*"These days we do the typical stuff that any union does, but by and large we generally accept that the amount of money available for pay rises is going to be what it will be and we'll try and protect people's jobs as far as we can, but professionalism is really the issue – for members to have a quality career and promotion. It's about the quality of their career, giving them something that can fulfil them."*

(National Project Manager, FDA)

Similarly in ATL, learning takes the form of accredited CPD for members and is integral to "the union's proposition to its members, if you start at recruitment." This does not mean it does not have a wider organisational impact but "it has to be distinct, weaving CPD and learning activity into wider organisational stuff." In PCS, learning may offer members career options or progression in a changing labour market and amid the context of job losses, "but at the same time you want the union to benefit as well, and clearly we want to see it as being a recruitment tool – an organising tool." Another national officer expressed some reservations about the link between learning and government and employer skills frameworks:

*“I think it’s a real shame the Government is now talking about skills for work rather than Skills for Life – it’s a mistake, we’re just doing the employers’ jobs for them. One of the things that’s made me frustrated over the last six years is the completely unrealistic expectations of union learning reps – the idea that they will somehow deliver the Government’s skills strategy; that they will deliver the employers’ training programmes for them. They are union reps first before they are any of the other things.”*

(National Project Manager)

Learning facilitates a key process: it allows ULRs to talk, face-to-face, with workers who may have had no previous contact with the union, or who may have been reluctant to engage with it. National officers described how learning can change outdated or negative perceptions of the union, broadening its image as an organisation concerned only with “traditional” workplace issues:

*“There is a need to understand the importance of learning to union members – I think that’s become clear from our existing members. I think that in the past perhaps there’s been a reluctance to move beyond the normal parameters of what trade unions do – that is, workplace issues – and I think this has reminded people that training and learning has always been a workplace issue but perhaps it needed reinforcing.”*

(Head of Lifelong Learning and Officer Training, Unite–Amicus section)

In his critique of the role of union learning in union revitalization, McIlroy (2008) argues that the distinction between recruitment and organising has not been acknowledged in the learning literature. While recruitment is restricted to simply attracting new members, organising implies systematically building the union at the level of the workplace and a degree of self-organisation (McIlroy, 2008, p301). While some national union officers failed to make this distinction in their narratives, others emphasised that learning should not be measured simply in terms of recruitment. For

Unite–T&G section, the impact of learning goes beyond recruitment: regional Learning Officers will report at team meetings how many new members have been recruited through learning, but the impact of learning is not defined merely in terms of recruitment:

*“You can’t say: ‘Well, we’ve got an extra 64 members therefore we’re a better organised workplace’. You’ve increased your membership, but you’re not necessarily a better organised workplace. One of the things we do know is if the members are more involved in education then they’re more likely to get involved with trade union business and more likely to support the shop stewards. People in the Education Department within Unite–T&G section have always maintained that education is key to organising. It’s not always about numbers; it’s about giving people the skills to organise themselves – giving them the confidence and the skills to put themselves into a branch, organise themselves into a branch, organise themselves into committees and have the skills to be able to liaise with the employer on whatever issues are affecting them.”*

(National Union Learning Organiser, Unite–T&G section)

Unite–Amicus section looks at the issue in a similar way:

*“It is about embedding learning into union structures and showing that the learning agenda has an impact on the ability of the union to effectively organise, in terms of both recruiting new members, and also rejuvenating union activity in the organisation where it has gone stale.”*

(Regional Learning Organiser, Unite–Amicus section)

For national officers, one key impact of union learning is its ability to encourage new activists, generally considered more representative of the workforce in terms of gender and race than existing activists, with the potential to renew workplace activity and transform and strengthen union branches. At ATL, “a significant minority” of ULRs have gone on to take on other union responsibilities, up to and including branch secretary:

*“If we want to find new ways for new people to get involved in the union, union learning’s got to be a part of that. It’s clearly a vehicle to bring new people into union activism and to help or renew wider levels of union organisation. That’s why we’re pursuing it – why we see those two things as working together.”*

(Head of Recruitment and Organisation, ATL)

While for Unite–T&G section, learning is a tool to be used for issue-based organising, in UNISON the focus is more on organising around learning itself, with an emphasis on self-organisation. For UNISON, a key measure of learning activity is the number of branch education teams established, because that shows that Regional Learning and Development Organisers have left something sustainable in the branch:

*“It reflects activity rather than just ULR numbers: I suppose ULR numbers is a measure, but I don’t think it’s the most critical one because it doesn’t measure what they’re doing... The crucial measure is evidence of engagement in branches and for UNISON it is lifelong learning co-ordinators and education teams.”*

(National Project Manager, UNISON)

For those involved in learning, this emphasis on the organisational impact of union learning is crucial for two reasons. Firstly, it should guarantee union learning is integrated into the wider union:

*“It’s always been our strategy that learning has to be part of ordinary branch business, which is how I would define organising – the recruitment of members through learning. It’s also about influencing branches to make learning part of their day-to-day business .... It would be impossible to disentangle learning and organising because the reason we’re able to convince and encourage the union to commit to learning is because there’s a benefit to the union. It is about life chances for our members, but it’s a lot more than that. Four national*

*project posts and nine regional learning and development organiser project worker posts are now permanent; we would not have been able to do this if it was not clear learning is day-to-day union business.”*

(National Project Manager, UNISON)

Secondly, and related to this, the stress on the organising outcomes ensures that union learning is valued and supported in the wider union, sometimes in the face of scepticism. As one respondent commented: “It doesn’t appear that there’s the same emphasis put on learning and organising from an organising perspective as there is from a learning perspective.” For some unions it is essential to justify the union’s investment in the learning agenda:

*“I think we have a job to do to ensure that leadership understands that learning is an issue around which you can effectively organise, because the thing that will convince general secretaries of the value of this is hard evidence and what impact it’s having in the workplace. They will want to know if we are recruiting more members and activists as a result of it.”*

(Head of Lifelong Learning and Officer Training, Unite–Amicus section)

## Measuring outcomes

There is little evidence that unions have established systematic processes at national level that can measure the outcomes of union learning beyond those capturing the learner numbers which are reported to the ULF. While, for example, ATL collects outputs on numbers of learners through a website for ULRs funded by the ULF, systems reflecting wider outcomes are currently more informal. In terms of recruitment, UNISON has case study and anecdotal evidence suggesting that the union has recruited members through learning. PCS members are not asked why they joined, although the union is planning to develop a system to link its membership database with ULF data. In Unite–Amicus section, Regional Learning Organisers record the recruitment results of learning activity and provide case studies of good practice which are publicised in the union and used to reassure its leadership that learning is having an impact. Information is reported to a national steering group that oversees all the work of learning in the union, which is then fed up to senior management and the NEC. In Unite–T&G section, Union Learning Organisers monitor recruitment and report to the national Education Team; there are also reports at regional level on the number of ULRs trained and the number of learning agreements signed, as well as case studies.

Unions are collecting some information on ULRs. UNISON's membership system shows that around 60 per cent of ULRs are new activists. ATL collects information from those attending training courses which reveals that around one-third of their 120 ULRs were not active in the union previously, with the figure rising to nearer 50 per cent for those recruited in the previous year. The FDA now has 40 ULRs covering 15 departments, 23 of whom are new activists. PCS has 1,500 ULRs and believes at least a third have not previously been representatives. Most of the union officers taking part in the research considered that union learning has encouraged new activists who are more representative of union members in terms of gender and ethnicity, although few could quote actual figures on this.

National officers expressed the view that although unions are moving towards more systematic monitoring of the wider outcomes of union learning, such processes are still in the early stages of development. *“It will be some time before we can genuinely assess our impact nationally regarding membership recruitment as a result of that,”* says Unite–Amicus section, while the CWU says: *“We’ve got no firm outcomes: we’ve got anecdotal stuff that we could probably flesh out [but] not hard statistical evidence .... We’re beginning to track people through now, but it takes a while.”*

All the national officers interviewed believed there was some value in measuring the wider outcomes of union learning, but they also raised a number of problems about monitoring. For instance, since ULRs are volunteers it can be unreasonable to expect them to find time to collect and report information to the union beyond that required by the ULF:

*“It’s very difficult to impose a discipline on them about reporting what’s going on because they do it largely in their spare time and we don’t want our union learning reps to think that when regional learning organisers come to see them, all they’re interested in is how many people they put through training courses.”*

Head of Lifelong Learning and Officer Training,  
Unite–Amicus section)

Even when the design of a union's membership form does allow it to establish a causal relationship between learning and recruitment in theory, it's still not always possible in practice:

*“It’s highly problematic: all our forms have a checklist, a code, but nobody uses it. Often they’re dealt with at branch level and they never get filled in. It’s incredibly difficult to say someone joined the union because of learning rather than an increase in branch activity. We’ve tried really hard to monitor direct numbers but it’s very difficult.”*

(National Project Manager, UNISON)

In addition, some national officers did question the value and sensitivity of monitoring:

*“I can see the benefit of union learning for organising – whether I want to go trumpeting that from the rooftops and letting the employer know exactly what we’re using it for is another matter.”*  
(National Project Manager, CWU)

Another national officer conceded that monitoring wider outcomes was important, but also argued that it was problem when unions got “a bit hung up on targets and numbers.”

Many expressed reservations about the value of specific indicators, for example the number of Learning Agreements or Skills Pledges signed by employers:

*“We have targets for the number of employers signing the Skills Pledge. They are important indicators of activity at employer level but they’re just indicators, not the be-all and end-all. The existence of a paper learning agreement may tell you nothing about the level of activity for that employer.”*  
(National Project Manager, UNISON)

While numbers of members, numbers of learning agreements and the number of ULRs recruited as a result of learning activity are all seen as measures of the success of union learning, other aspects are more difficult to capture, for example changing perceptions of the union; improvements in communication; engagement and relationships with management; and the extent to which learning is used as a bargaining and negotiating tool. Increased workplace activity is considered to be just as important as recruitment and ULR numbers, but more difficult to substantiate and a more subjective measure. Organising outcomes were seen as hard to measure and impacting over the longer term:

*“I think organising actually takes somewhat longer [to measure] because it’s not about recruiting a member – it’s far deeper than that. It’s something*

*you would have to look back on over a period of time, asking questions like: Where was the branch? Where is the branch now? What took place in the middle? Was learning part of that?”*

(National Union Learning Organiser, Unite–T&G section)

National officers were interested in the extent to which ULRs widened union involvement and impacted upon the branch by taking on other union roles; attending meetings; taking part in campaigns; and creating a union presence in previously untouched workplaces. For Unite–T&G section, one key outcome was boosting ULR confidence and reducing dependence upon full-time officers:

*“...confidence to take on issues in the workplace, ... less involvement of an officer, because you take ownership of workplace issues and that comes with confidence. One of the things that you could have is a measurement of how much time the officer spent servicing this particular company and does he or she need to service it more or less.”*

(National Union Learning Organiser, Unite–T&G section)

National officers were keen to evaluate the extent to which learning is integrated into workplace and branch structures. For UNISON, the crucial measure was evidence of engagement in branches and establishment of Lifelong Learning co-ordinators and branch education teams:

*“It’s learner numbers, ULR numbers, but also, more importantly, the number of branch education teams we’ve established where the Regional Learning and Development Organiser can say reasonably confidently that they have left in the branch something which is sustainable. In other words, they haven’t just trained the ULR; they’ve got an appropriate number of ULRs to reflect the size of the branch, one of whom is a lead ULR, taking on the role of a Lifelong Learning Co-Ordinator. If we’ve got those criteria in place, we would count that as a branch education team and we measure that.”*

(National Project Manager, UNISON)

Similarly for the CWU, evidence of more regular contacts between the union structure and union reps is key “because that reinforces the organisation that you’ve already got.” One measure of integration may be the number of motions on learning coming through from branches to the various policy-making forums of the union: *“I think that gives an indication of the impact learning is having.”*

Union learning has also had some unexpected outcomes. A learning needs survey in one UNISON branch identified key literacy and numeracy needs among existing stewards, which affected their ability to fill in UNISON paperwork about cases. In response, the ULR ran a literacy course for reps, which has had a positive impact on branch organisation. As a result, UNISON has identified the numbers of stewards completing the relevant forms for UNISON as a measure of learning in its ULF bid, perceiving it as a reasonable measure of the success of Skills for Life courses. At the same time, the union has realised it may have to make its forms more accessible. Similar issues about the

learning needs of existing reps appeared in the Unite–Amicus section case study reported below.

In PCS Eastern Region, ULRs have been instrumental in “town committees” of PCS activists and representatives from different departments, which play an important role in local campaigns, for example the Make Your Vote Count campaign, which challenged local election candidates on their support for public services. This suggests a wider impact of learning and its potential for encouraging democratic engagement.

The research presented here cautions against measuring the outcomes of union learning in terms of narrow or fixed targets, but it also suggests there is value for unions in ensuring that the full potential of learning for the wider union is fulfilled.

Appendix 1 suggests a number of areas that unions might consider when evaluating their learning activity and also a number of outcomes that might be used to assess whether union learning is having a wider impact.

# Case studies at workplace and branch level

How far do national strategies reflect union activity on the ground? The rest of this paper draws upon seven case studies proposed by the national learning officers interviewed as part of the research. These case studies suggest five key themes:

- Learning is a key strand in union organising campaigns.
- Learning requires strong workplace or branch organisation.
- Unions are integrating learning into wider union structures and agendas.
- Although union learning may be related to employer skills agendas, it also goes beyond individual employability.
- Learning is offering a path to union activism that strengthens union organisation.

# Learning as a key strand in organising campaigns

## Case study: Unite–T&G section’s Learning for Justice Campaign

Unite–T&G section’s organising and learning departments have made learning central to the union’s organising campaign among migrant and other vulnerable workers within the cleaning sector at Canary Wharf, in the Tube and in the City of London. The two departments work together on this joint project, which builds on the union’s three-year Justice for Cleaners organising campaign across the three sites.

The campaign aims to achieve minimum pay of £7.20 an hour for cleaners plus night shift allowance; 28 days’ paid holiday each year; sick pay and pensions; and, more broadly, respect for cleaning workers. So far, demonstrations at Canary Wharf have won pay rises for around 2,000 workers employed by five cleaning contractors in at least 11 banks. A number of cleaning companies have signed voluntary recognition agreements with the union. Wage negotiations start when the union recruits a minimum of one in five workers on sites and sets up committees with stewards it has trained in the art of negotiation.

Learning for Justice aims to deliver lifelong learning to the heart of the organising agenda by providing migrant workers with access to the learning they need and the confidence to build their union.

Classes in English for Speakers of Other Languages (ESOL) are held on Saturday mornings on union premises, organised around work-based and trade union issues as well as Skills for Life. The cleaners themselves are migrants from all over of the world, some, such as the Colombians, with strong trade union backgrounds:

*“They are well up for everything and are prepared to organise themselves and take things on and stand up for themselves – the hurdle is that they have no real understanding of UK legislation and how they access that legislation, particularly if they struggle with reading and writing and speaking English.”*

(National Union Learning Organiser, Unite–T&G section)

The project aims to meet the needs of the workers, who have control over how it develops:

*“Once people get into learning, they start to feel a bit more confident in themselves and they can have a*

*better understanding of the workplace and the politics of the workplace and how things work.”*

(National Union Learning Organiser, Unite–T&G section)

Beginning with Billy Elliot, the union has started to show films with a social content in the ESOL classes in order to explore the history of trade unions in the UK:

*“It had the social aspect and content in the film, so we showed the film and the following week discussed it. Fortunately the tutor we had at the time can speak Spanish so she ended up translating a lot of the film – she was knackered at the end of it!”*

(National Union Learning Organiser, Unite–T&G section)

Organisers attend the classes and highlight the benefits of trade union membership:

*“What we’ve found at the moment is that it is the students themselves who are members that are doing the recruiting for us ... workers have gone back to work after their first week back and said: ‘We’re doing this excellent course,’ and they’ve brought their mates along.”*

(National Union Learning Organiser, Unite–T&G section)

ULRs are, however, key to this process. The campaign had so far attracted seven ULRs through a seminar run for activists, although only one was formally recognised by the employer: a union member, but not an activist, when living in Ghana, he recognised workers would not attend ESOL classes individually, so met them at their workplace in Canary Wharf on Saturdays to take them to Unite–T&G section headquarters in Holborn where the classes were held (a good illustration of the crucial role of the ULR).

The union is beginning to sign learning agreements with the major contractors, who are recognising the benefits of learning for their workforces, particularly ESOL. There is a growing recognition that learning provision can address high staff turnover, which has been Unite’s experience in the bus industry. Some of the cleaning companies have provided ESOL courses, but because they have been employer-driven, workers have been sceptical about them and not attended in large numbers. An agreement with ISS addressing time off for ULRs and learners was in the process of being signed; the contract with Citibank would mean workers learning half in work time and half in their own time; and a unique agreement with OCS not only recognises ULRs, but also ensures that the union delivers shop steward and health and safety training for workers, as well as Skills for Life courses.

## Case study: CWU at BT distribution centre in Magna Park, Lutterworth

Agency staff are often considered difficult to recruit, but what is distinctive about this campaign is that it is aimed at the 200 or so agency workers (50 per cent of the staff) at the Magna Park distribution centre, initially employed via one agency, and later transferred to two others. The agency staff are on less favourable terms and conditions than permanent BT employees and many are migrant workers, primarily Polish, Asian and Somalian. The union has been attempting to negotiate to make them permanent. The CWU has two union learning reps among the permanent staff, one of whom is also branch secretary and a health and safety rep.

The union has arranged for agency workers to use the BT Learning Centre, which has been providing ESOL, IT, numeracy, literacy, languages and healthy living courses as well as NVQ courses in distribution and warehousing for the past three years. BT has agreed to match learning time put in by the workers themselves – an hour of BT's time per week to an hour of the employee's time – and has extended this agreement to agency workers. Keen for their workers to use the Learning Centre, the agencies have approached the union about signing Learning Agreements, but the CWU has refused until the agencies grant them recognition.

Learning has enabled the union to begin recruiting agency workers – something it has never successfully managed before. But while the union offers agency workers information and advice, it cannot represent them without union recognition. When the previous agency was operating on the site, the union held a Learning Recruitment Day to promote learning and attempt to recruit members, which prompted around 40 membership enquiries:

*“You cannot argue this hasn't come about because of the learning centre. We tried for five years, and you set up a learning centre and then they come to the trade union and ask what we can do. I think that's really good – especially with the ESOL course.”*

(Lifelong Learning Project Worker, CWU)

However, this case study also highlights the difficult relationship between learning and recruitment: when the union tried to follow up the learning experiences, many of the workers did not subsequently join (the ULR believed the agency had put pressure on them to withdraw their applications):

*“If you've got an agency talking to people who are not from this country, all kinds of rubbish is put around ... it's not legal for you to join a trade union and so on. We're still trying to get them to join the union, but we don't actually pressure them. I mean, you can't really pressure somebody. From time to time, we say to them: 'Look at what's happening in the workplace – it would be beneficial for you to come on board.' Still, even though some people haven't joined the union, we've still given them the opportunity to actually learn at our Learning Centre.”*  
(Lifelong Learning Project Worker, CWU)

With the help of the CWU's organising department, the Regional Project Worker subsequently launched a campaign to recruit enough agency workers to enable the union to approach the two agencies for voluntary recognition. The union organised another Learning Recruitment Day when the Regional Project Worker and organisers from unionlearn went to the shop floor and signed up 70 workers for courses, including the Homeland Qualification Recognition course, which is free to migrant workers, as well as general learning programmes.

With an attack on the agency workers' bonus scheme making recruitment easier, union reps distributed membership forms and planned a mass meeting where they hoped to attract more new members. Importantly the union had recruited four new ULRs, including one from each of the agencies and was attempting to negotiate paid release for them – BT and one of the agencies had each agreed to fund half the costs of the release of one ULR; the other agency had so far refused to do so. A number of workers signed up for courses and joined the union at a subsequent meeting involving union organisers on BT premises.

The CWU has also recruited non-agency staff through learning, and the ULR believes that learning plays a key role in union organisation:

*“I think they actually see that there's a way forward for them to actually get accreditation – it doesn't really matter if it's not work-related, but they can actually get a certificate. I think it has inspired them to see what the union was actually doing and inspired them to come on board and learn. We have a high ... turnover and people come for two or three weeks and then they've gone. They put in a lot of students, but the ones who have actually been there for a while or think they're going to be there for a while – these are the ones that come on board.”*  
(ULR, CWU)

# The role of learning in building workplace and branch organisation

## Case study: Unite–Amicus section at Tayside NHS Trust

Unite–Amicus section has linked learning to organising at the Tayside NHS Trust around a key issue at the workplace: the Knowledge and Skills Framework (KSF), part of the NHS Agenda for Change, the development review process aimed at ensuring health service staff have the skills they need to do their jobs as well as opportunities to develop.

Workforce concerns about KSF and its clear relevance for union learning has provided the impetus to rebuild the Unite–Amicus branch at NHS Tayside, highlighting the importance of strong branch organisation to facilitating union learning. Covering hospitals in Dundee, Angus and Perthshire in Scotland, the branch had an active branch secretary (also a ULR), but few of its 40 representatives were really engaged with the union which made it difficult to embed union learning activity:

*“We needed to build a strong branch at Tayside first, and rather than trying to impose a lifelong learning programme from outside that members might not particularly want, we linked it to KSF, which is being implemented and rolled out now, and which was clearly a concern for members.”*

(Regional Learning Organiser, Unite–Amicus section)

After management briefings on KSF had left many unclear or confused, the branch secretary organised a highly successful two-day training course on the issue so representatives could respond to workers’ concerns (the first day offered an overview of KSF; the second discussed branch organisation). What emerged was that while new representatives had not received any training, neither had a number of long-standing representatives (or had not recently):

*“We had a union workshop and we had some interest in new learning reps, and what came out more strongly is people wanting to engage in union work, feeling they needed more general training before they could do the learning reps training. At the end of the day, the end of that session, we identified what was wrong with the branch and what we needed to do.”*

(Regional Learning Organiser, Unite–Amicus section)

The branch secretary organised 30-minute chats with all the reps so he could produce individual training profiles for them. Typical responses from the reps were:

*“Probably right now personally I think I just need a whole load of information on pretty much everything – how procedures are done, how you deal with certain things, basically just a good grasp of the basics.”*

*“I think that’s the thing – it’s getting a basic course to give you a foundation, give you confidence.”*

*“I mean to challenge management. At the end of the day that’s what it could be, challenging management, so you need to have the confidence.”*

The branch secretary also undertook an electronic survey of representatives’ training needs, asking them what training they had had; what training they thought they needed; and what they saw as the barriers to training. The idea was to build a team, with reps with different areas of interest and expertise communicating with each other in order to ensure they covered everything. Because the KSF event identified a need to improve communication across the branch, the branch secretary has since compiled an email database; was planning a branch website; and had also planned a three-day course on pensions in response to member enquiries.

For the Regional Learning Organiser, union learning is not only about recruitment, but also about sustainably building the branch (which may be a gradual process):

*“Learning encourages people to join the union, but an effective workplace structure is the best recruitment tool there is. So we want to set up a long-term relationship that will develop the needs of the new reps. It’s important that we do something sustainable. You need to look at the industrial relations environment and you can’t impose lifelong learning in the workplace from outside. You have to look at what members are worried about. Lifelong learning isn’t just some funny thing, it’s about demonstrating the real relevance, so you need to devolve all of that stuff down to workplace level and deliver what members say they need. And I think that it’s a key to rebuilding the trade union: building strong workplace structures and making sure that you have reps on the ground.”*

Regional Learning Organiser, Unite–Amicus section)

This theme is also reflected in the ATL case study (see 5.4 below), where learning has been part of the revitalisation of union organisation in London.

# The integration of learning into union activity

## Case Study: PCS in the Department of Work and Pensions

PCS in the Department of Work and Pensions has directly addressed the integration of the union learning and collective bargaining agendas at workplace level, which previous research (Wood and Moore, 2005) suggested could develop separately from each other. Initially because learning had been organised nationally, activists within the DWP often didn't know that union learning existed, which encouraged a degree of scepticism from those on the branch's Executive Committee, who feared that learning would be another task for existing activists to pick up, in the context of fighting job cuts. Later, when it began to be organised at departmental level, liaison with management was through a joint management-union steering committee outside of normal consultation and negotiating procedures. Union learning was not taken up on the departmental trade union side, where negotiations took place.

*“Originally we made a mistake because what we didn't do was to deliberately seek out the bargaining agenda. What we did do, as a matter of fact, is the exact opposite .... What it did was it said to those people who weren't persuaded: ‘Well, we are different.’ .... What we should have been doing is what we're doing now, trying to get our feet under the bargaining table.”*

(Union Learning Project Worker, PCS)

This has now been rectified with learning and training brought into the departmental trade union side as a negotiating issue, dealt with by the branch negotiating officers – which has also revived training as a bargaining issue. The DWP branch has taken a number of further steps to ensure that union learning and ULRs do not exist separately from the branch. ULRs are encouraged to take a basic reps course, “because if they are going to become active in the union, they've got to know what the branch is and what the structures are.” Initially, ULRs had access to separate funding for activities (eg, attending regional ULR networks) from national level, but now they have to make the case for financial support to the branch, which makes them more directly accountable.

However, just as existing activists initially saw ULRs as developing outside branch structures, the new ULRs found it hard to identify their role in the branch and find their way around branch structures. While union learning has provided the Regional Learning Organiser with the chance to become active, becoming part of the union as a whole has been a real challenge:

*“In some ways, that's probably been the most difficult aspect to deal with – if you come in completely from outside and you've no background, you don't necessarily understand the role, because a lot of the people who are in it have been activists for quite some time. It's like any job that you have – rightly or wrongly, you speak in jargon and you assume a certain level of knowledge.”*

(Regional Learning Organiser, PCS)

The support of her branch and existing representatives has been crucial to her becoming active in the wider union, and she is now central to the Branch Executive Committee and wider union activity. She recognises the importance of integration into the branch:

*“With the regional committee, it's vital to be involved with that because that gives me the overview of everything else that's going on with the union and how we fit into it and that also gives me the opportunity to explain to [ULRs] how learning fits in, because some union reps don't see learning as key and there's a lot of work to be done there.”*

(Union Learning Project Worker, PCS)

She recognises the danger of ULRs developing separately from the union and the need to actively address this:

*“You need to explain it to them, they need to know where they fit in and they need to know that they're part of the branch and they can't go off and do things independently – because some people when they first come in don't realise, some ULRs with no background. It's not one-sided, it can be that the new folk don't understand their role and where they fit in and don't necessarily feed back enough to their branches, so again it's just that understanding that you must feed into your branch, you belong, you're*

*part of that, you're not independent of it. Normally if I can get to folk quickly enough and explain how they fit in, we usually smooth a lot of the stuff over."*

(Union Learning Project Worker, PCS)

She explained the importance of being available to new ULRs and also made the point that there are wider lessons to be learned from the ULR experience:

*"To be honest, they're only saying what the rest of the membership are saying in some ways and that's something we've got to be aware of with the union, and that needs feeding back. I know we put literature out and if you read it and you take the time you'll understand it, but a lot of folk don't and that I think is the one thing I've learnt the most about – how the union works with its membership and activists, and there can be, if you're not careful, a gulf between your activists and your ordinary member."*

(Union Learning Project Worker, PCS)

The DWP initiative paid off in the union's recent national industrial action on pay: although some of the ULRs were initially nervous about picketing, once they understood what it actually involved and had taken part their confidence grew, by the end of the action there were more ULRs on the picket line than non-ULRs. As one ULR put it:

*"I'm hoping that being on the branch executive committee ... we can educate those existing, shall we say, more traditional union reps, that the role of the ULR is not just to be alienated from [the union] – we are actually recruiting, we are actually going on picket lines, we are doing traditional union stuff as well, and the other way is that ULRs are now realising the more traditional union business, so it's a two-way thing."*

(ULR, PCS)

ULRs in DWP are now seen as union reps by their branches, "not just a frippery, an add-on." The branch has taken small but significant steps to remove barriers to union activism, providing an example of how union learning can become an integral part of union organisation.

# A wider vision of learning

## Case Studies: FDA's Union Learning Fund Professional Skills for Government project; Unite–Amicus section at Tayside NHS Trust; CWU at BT Distribution Centre, Magna Park; UNISON Exeter University Learning Partnership Group; ATL London Wide.

Previous research has suggested that union organisers may be sceptical about union learning because it is seen as promoting individual employability, rather than as a collective issue around which the union can organise. In a number of the case studies, learning was linked to employer skills agendas, or the professional needs of members, but broadened to incorporate a wider vision of learning, and also used as a basis for collective organisation. The FDA has developed union learning as part of the union's response to the Professional Skills for Government (PSG) programme, which aims to ensure Civil Service staff have the appropriate skills for their current job, and can develop their careers. The FDA's ULF Professional Skills for Government project focuses on getting the most out of the PSG framework and the Government Skills Strategy:

*"It's definitely linked to Professional Skills for Government. There are big concerns around PSG, and we're branding this as an approach to the problem, an approach the union can take."*  
(National Project Manager, FDA)

The union sees this as "a continuation of the best trade union principles – unlocking and developing individual action through collective action." The project aims to: improve the offer to members beyond "pay and rations"; contribute to improving workplace organisation; enhance the professional brand of the FDA; display the union's commitment to the skills agenda; and support partnership with the employer. It also supports the greater participation of younger members by attracting at least eight ULRs from the Civil Service Fast Stream programme. The project

steering group comprises members of the FDA's executive, officers from the union's organising team, representatives of Government Skills (the Sector Skills Council for the government), from TUC's unionlearn and from the Open University.

The union has identified the role of the branch in supporting the ULR, which includes negotiating a Union Learning Agreement, helping to develop skills audits, and encouraging ULRs to get involved in branch activity as part of their branch committees. One new ULR saw her role as putting pressure on management to ensure PSG is implemented effectively. Trained ULRs will offer support and advice on professional development.

Although the project focuses upon career development and helping members get the most out of the government skills framework, it also aims to access learning and skills opportunities to meet wider personal development (eg, support for dyslexia, dyspraxia, and similar conditions, as well as literacy or numeracy – FDA members in senior positions can still operate without literacy and numeracy skills). The union is also considering offering parental coaching for new parents, as well as languages, "so actually, we would want to look a little bit outside the box." One ULR felt that learning would be integral to career development for senior civil servants, but could also have a wider role:

*"Personal development, satisfaction, fulfilment, life purpose, passions ... Sometimes it's very tangible: 'I need to make more money, I have to pay the mortgage or I have to get into this field because I need another £100 at the end of the month'. I'll help people with whatever it is that they need."*  
(ULR, FDA)

As shown above, it was the employers' Knowledge and Skills Framework (KSF) which provided an issue around which the Unite–Amicus section branch could organise. The union recognised that KSF was an opportunity to increase members' skills and provide opportunities for progression within the organisation, but that it could also help workers to

identify their aspirations through KSF and tie these into wider learning. The branch carried out a learning needs survey which attracted responses from around one-third of the workforce, suggesting the resonance that learning has for workers. For members required to undertake continuous CPD as part of the state registration of their profession, the union is seen as providing support and playing a role in negotiating time off. For manual workers, it is about addressing the historical lack of career progression and training, but also ensuring that learning is not just confined to the demands of their current jobs, but addressing longer term needs and broader learning aspirations.

*“Management will do as it needs within the jobs that people are doing: I think we’ve got to tackle allowing people to develop as they want to develop. One of the things we were discussing at the last meeting was that KSF is good in that it forces management to see that they’ve got to develop people within their work role, but it doesn’t say they’ve got to develop them outside their work role and that’s where I see the learning coming in, that we can actually give them that additional development. And again, if people want to learn other things (what’s come from the surveys we’ve done is that people want to learn languages) it also increases people’s confidence as well. I mean, some of the feedback we’ve had from the basic IT courses very much was on that: it was that people didn’t recognise their abilities, that they now realised that they can do these things and it’s given them a lot more confidence.”*

(Branch Secretary, Unite–Amicus section)

This was similar for workers at the BT distribution centre at Magna Park:

*“When we had the open day ... a lot of people actually realised what was on the table for them. And basically people who didn’t want to, or didn’t think they could, learn have actually come on board now and those who are interested go forward and learn a different skill. There’s a lot of people out there who want to learn but don’t know which*

*avenue to go to find the level of learning that they actually need. So I would say the learning centre and the union putting on education for people and getting people on board and realising that there’s courses there and the facilities are there for them to actually higher their education – it’s fantastic, absolutely fantastic.”*

(ULR, CWU)

For the ULR from the Justice for Cleaners campaign, union learning provided low-paid workers with the opportunity to go back into education, something they wouldn’t be able to afford otherwise. And union learning allowed African workers whose qualifications are not recognised in the UK to get accreditation.

At Exeter University, a Learning Partnership Group arose out of a Return to Learn pilot programme, initially funded by UNISON and promoted by the branch secretary, before it was picked up by the university. The university’s Learning Partnership Group, which was set up to maximise the effectiveness of ULRs, comprised learning reps from each recognised union alongside Personnel and Training and Development Unit staff. It met the Head of Training and Development once a term to discuss the learning needs of all staff and to ensure equal access; to establish a communication network to ensure all employees were aware of learning opportunities available to them; and to review the role of the ULRs in the university and the effectiveness of training provision.

From this, the branch secretary and a new ULR began to develop some taster courses with other branches in the region which were for UNISON members only (unlike Return to Learn courses). Held in the local Workers’ Educational Association (WEA) offices and funded by the region with the branches covering additional costs like childcare or travel, the courses included: recognising and dealing with stress; personal finance; job skills; and assertiveness for women. “We came up with something totally different than what they normally roll out through the region.” Courses ran for ten hours over four evenings, with just under 20 members per course from different branches in

different service sectors (eg, higher education, the police, health and local government) – a mixture of members which created further interest because “people wanted to meet up afterwards [for] the social side of things.” The courses have been so successful that there are waiting lists:

*“To actually say: ‘Come along to a course’ ... puts so many people off without even going further and that’s where the ideas that we came up with were wonderful, because they’re not academic, they’re for everyday life – and that’s why they’re so popular, because it doesn’t sound like you’re going to study. To learn about personal finance – everybody’s got an interest in their savings and mortgage.”*

(ULR, UNISON)

The ULRs believe that holding the courses outside of work is doubly beneficial: no one needs to get permission from management; and not being with immediate work colleagues or managers means participants are not inhibited either about revealing their lack of skills or worried about what they can say.

Although the ULRs make sure that there are membership recruitment forms at every event, UNISON’s new ULR focussed upon learning as a positive material benefit for existing members, countering what might be perceived as the defensive and negative role of the union in the university. Like a number of ULRs from other unions, she emphasised the key role of union learning in the retention of members:

*“At the end of the day, some of the people who attended the taster days may have been thinking that UNISON wasn’t doing anything for them and in that way we’ve retained them. You can look at it in two ways: you’ve retained members and then they might get talking and [say]: ‘Oh yeah, I went on a course this year and it was really good’ and then word of mouth [spreads].... But you’ve kept those members and kept them happy and I think that’s really important, definitely. Sometimes you think that people concentrate on recruiting new rather than retaining old, which I think we do*

*more of, concentrate on the current and then we’ll move on to potentials afterwards.”*

(ULR, UNISON)

The branch secretary concurred:

*“You feel that you’re giving people something; you feel there’s something tangible there at the end of the day. As steward, it’s a very important role, but you can only do so much, you can represent, but it’s in an individualist way; whereas learning’s about everybody, you take everybody on board and it’s a more holistic approach to unionism.”*

(Branch Secretary, UNISON)

This focus on retention, as well as recruitment, was shared by a new ULR in the FDA:

*“I’m hoping that in the first instance people will feel that they’re getting a pretty good service from the union and I’m hoping that it will mean that they will happily continue their input. I’m hoping that it will mean that people will hear about it, people will become interested and think: ‘Oh well, they’re actually getting really good advice or good help and maybe I should think about becoming a member as well.’ I’m hoping that it will raise our profile: if it can be another tangible benefit that the union can provide that would be good.”*

(ULR, FDA)

Learning is particularly significant in ATL because of its history as a professional association and the importance of continuing professional development (CPD) to its members and potential members. Yet at ATL, learning is also as much about personal empowerment and confidence as professional development and has helped to rejuvenate activity in the union branch in London. Established in 2006 in response to organisational weakness, ATL London Wide brings together members from the union’s 33 London branches essentially through learning, but linking it to the renewal and regeneration of the union in London:

*“London Wide started because if we didn’t do something London would die and there was a large*

*membership that would go totally unrepresented and we needed to do something.”*

(Regional Secretary, ATL)

Gradually a wider vision has emerged: to develop teachers and educational staff in London, not only professionally, but also in terms of personal growth and engagement with union activity. The network meets three times a year on Saturdays between 10.00am and 3.30pm and has organised five taster sessions so far, each attracting around 40 members, covering professional development for teachers and support staff, which is distinctive and idiosyncratic (“we were looking for, if you like, the quirky, the CPD that schools didn’t do.”). One session dealt with bereavement and trauma in the classroom – an issue that most teachers have to deal with at some point, but for which they get little support despite often having to take on a counselling role themselves. Another covered dyslexia awareness through the experience of a dyslexic trade unionist, again taking a slightly different slant from formal CPD:

*“I suppose it’s putting yourself in other people’s shoes that London Wide is in a position to do where schools’ professional development, if it’s not in their development plan, they can’t really do it .... One of the huge things that union learning can do is actually go round the side, there’s so much that can be done by going round the back door – if you say to somebody: ‘What are your learning needs?’ they actually need to be very perspicacious to understand what they are.”*

(Regional Secretary, ATL)

The organisation of these taster courses has led the regional secretary to get into email communication and personal contact with a large number of members in London and she has become a focus for organisation:

*“They feel there’s a personal connection, you kind of begin to be a clearing house because there are at least 500 people who regularly read the emails who know that if they email me I’ll find an answer. So it kind of strengthens – if you say ‘the union structure,’ that’s*

*giving it too much credence – it kind of strengthens the feeling of belonging because they feel they have a stake .... They laugh at me because they do these bright yellow T-shirts with “ATL the education union” on and I always wear mine to London Wide because it means everybody knows who I am without bothering to ask.”*

(Regional Secretary, ATL)

London Wide has led to contact with nearly 200 members in all but one of the London boroughs and the joint secretary suggests that probably no more than 20 of these are people who would have been involved at the beginning. Crucially, through learning, London Wide has begun to provide a springboard for encouraging, developing and supporting potential activists. For one learning organiser it is about:

*“... identifying new activists and providing that first face-to-face contact which allows you to build a relationship with them, so you’ve gone from zero communication for the last eight years to being able to have members talk about their experience of local events and their positive experience of ATL, so that’s (I think) pretty useful in terms of making people realise that there is a possibility of getting involved in their union locally.”*

(Learning Organiser, ATL)

To consolidate this potential, London Wide has introduced an organisational element: at a recent event, the union ran a session looking at the roles of different representatives – ULRs, health and safety reps and school reps – and how they might work together in a school team. From this, seven members expressed an interest in the ULR role and two in health and safety, and a session on negotiating skills was planned for the next event. London Wide is now seen as starting to have an impact on union organisation in the region:

*“It’s a sea change: London is not dead and London is perceived as being not dead.”*

(Regional Secretary, ATL)

Learning is seen as much about personal empowerment and confidence as professional development. The joint secretary is a retired teacher who was a long-standing branch secretary and who has now become a major driving force for union learning within the union:

*“I think probably that’s why I feel so passionate about union learning because it’s not just about teaching new craft, it’s about making you a bigger person – and who you are is really important for the kids you teach, far more than the subject, because who you are is what they remember.”*

(Regional Secretary, ATL)

This activist defined herself as “non-political” and attracted to the union because it was not seen as confrontational, yet her perception of learning goes well beyond narrow individual career progression to one that not only empowers the individual, but also has an impact in the classroom and wider community.

Union learning also appears to have had an influence on perceptions of the union and even of the character of the union itself. Historically, ATL has been seen as emphasising member services rather than member involvement and workplace activity, but learning represents a bridge between the two:

*“I think it’s by trying to make the connection between the two, like the union’s ability to provide members with CPD that meets their needs and legal advice, as well as stuff that is directly related to its strength within the workplace. I think we’re trying to change that attitude by providing members with opportunities to get involved in organising events and organise those events for themselves so that they can see the benefit of that and also feel a bit empowered by that.”*

(Learning Organiser, ATL)

# Learning as a route to activism

## Case Studies: UNISON at Exeter University Learning Partnership Group; FDA's Union Learning Fund Professional Skills for Government project; ATL London Wide; PCS in the Department of Work and Pensions; CWU at the BT Distribution Centre, Magna Park.

Wood and Moores' earlier research (2005) found that although the majority of ULRs were existing union activists, nearly a quarter of ULR respondents were new activists, union members who had not held another position in the union. These new activists were more likely to be women, black or minority ethnic and younger, lending support to TUC claims that union learning is attracting a new group of activists to the union movement. However, the research raised questions regarding the integration of ULRs, particularly new activists, into the wider union, suggesting that the main motivating factor for becoming a ULR was a commitment to education, albeit within the context of union activity. New activists appeared to be less motivated by political commitment and a belief in trade unionism than existing activists.

The case studies reported here confirm that learning does provide a route into union activity and in certain cases this may be on the basis of learning. In the case study of UNISON at Exeter University, union learning provided a path to activism for one member who was specifically attracted by the learning role and would not have become a shop steward, perceiving that it would be "too much". So far, she had confined her activities to learning rather than wider union activity:

*"I think lifelong learning's an absolutely great thing for anybody, I've never been able to understand why somebody wouldn't be interested in lifelong learning .... I always partake [sic] in courses and so I thought it was a great idea to be putting forward learning, which I knew nothing about until it was mentioned: I was a relatively new member to the union, and so I joined up and as I joined up – literally within two to three weeks – there was a meeting about taster courses and so I kind of felt that I was jumping in at the deep end really!"*  
(ULR, UNISON)

Yet learning has had wider implications for the survival of the branch with the commitment of the existing branch secretary and passion of just one new activist making a key difference:

*"I would say it's had a very big impact because what we had at the branch before was very much an old-fashioned way .... It's brought new life into the branch, you can tell how enthusiastic she is and so am I, I can't tell you how pleased I am, having the heart there to do it as well. Yes, it is going away from the old steward role, it's not to preclude stewards from doing this sort of thing, because I have certainly found it far more rewarding."*  
(Branch Secretary, UNISON)

In the FDA, union learning has provided a path back to activism for some new ULRs. One former departmental representative who had stepped down after a brief stint because she believed she could not cover the role well enough (partly because she had a young child and partly because she had received no training) was specifically attracted to learning:

*"When I think about learning, I'm a bit like a child that goes into a sweetshop: I love libraries full of all the potential; I suppose also just the intellectual satisfaction of finding out stuff."*  
(ULR, FDA)

She also felt comfortable with what she saw as a less confrontational role than departmental representative:

*"There was negotiation with management, I was attending one or two weekly councils and I admit to some extent there is probably a shortcoming and a weakness or whatever – I find it very difficult to deal with senior management in terms of the quite antagonistic negotiations and I have had a conflict: I was very close to taking a grievance against a manager for bullying. I'm not ready to go into that situation again. In a couple of years I may be able to do that, but in the meantime ... I'd rather do something I can do where I don't have to sit there and negotiate with some really hostile senior management person. That makes the inside of me just squirm ... it should not be hard and it affects me, but I'm not good at negotiations ... I'm not ready to do the kind of difficult negotiations with management, but here is something I can do and do well and that would be my area, my niche."*  
(ULR, FDA)

She had been attracted into the ULR role in a Civil Service department where all the union activists were women, possibly in response to a feeling that “the women are being squeezed more at the moment, there are more women that feel they need to do something; I’m sure that as soon as there are some women [representatives], members see the union as a place where they can go to.” She described the expectation in the department that staff had to be willing to work long hours and that promotion was strongly dependent upon this – this was difficult for women with caring responsibilities.

Learning provided a path back into activism for another ULR, who had been active as a branch secretary in the former CPSA (now part of PCS), but not in the FDA because she had decided to concentrate on her career for a time after promotion:

*“[Union learning] has made me think: ‘Well, actually I quite enjoy this and I’d be prepared to do something beyond ULR’. I think with this department I probably won’t be anything other than an ULR because I have to leave in September. But when I go back to my home department I’m not sure, I’ll have to see if they need me for anything else. I think even though I’ve done wider trade union work before, I think I’ve kind of come away from it. And now I think the ULR stuff has given me, not even the confidence, but it’s kind of picked up my interest again and I thought: ‘Actually I really like this stuff’.”*  
(ULR, FDA)

In ATL, learning has transformed the outlook of an existing activist for whom increased involvement in the union, particularly through union learning, has been personally liberating:

*“I kind of spent my entire existence trying to look as if I wasn’t there. That’s another thing that’s been hugely liberating for me: I’ve stopped apologising for being odd – you don’t have to apologise for your existence.”*  
(Regional Secretary, ATL)

In the DWP, learning has provided a route into activism for members who were not previously involved in the union, particularly women. Like other unions, PCS has relied upon a small number of experienced and long-standing activists and in some cases there has been little space for

new people to become involved. Union learning provides that space and gives members a platform for further activity. PCS now has 340 ULRs, compared to between 50 and 60 in 2004, and around 70 per cent are women. The DWP case study shows how members can become politicised through union learning:

*“It has changed me politically. It’s not just the union, I think maybe that’s why you get a lot of middle-aged women coming into this role – I think you reach a point in your life where you start looking and questioning, maybe because your kids are growing up and you’re taking a view of the world and how everything fits together .... I’d also had some sort of personal changes that impacted on that as well. But I don’t think the change would have been as great or I could have expressed it as much or as well if I hadn’t taken up the union role. I see things completely differently now. And again that’s because of things that I’ve learnt through being in the union. Stuff that perhaps I wouldn’t have necessarily pursued, but as different papers have come across my desk, usually just for information, but picking up and reading it, and it’s made me look at things completely differently.”*

(Regional Learning Organiser, PCS)

For such activists, union education is crucial in supporting their role as a representative, but also wider political development. As one CWU ULR put it:

*“They gave me the opportunity actually to go on these courses: if I wasn’t in the union, I couldn’t have gone on any courses. So I’ve had the opportunity to go forward and learn more about how the union movement is. You learn about diversity, there’s a lot of stuff that you actually learn about. And it can give you a good sort of push in the right direction. It’s changed my attitude completely. Basically I know how to speak to people in the right manner, it gives you a sense of ability, to actually try and pass down what you know to other people. I studied Black history since I’ve been on these courses, and it gave me the incentive to think: ‘Yes, there is a body out there who understand racism, harassment, abuse, whichever terminology you want to use’. And there’s people out there that are willing to stand up and say: ‘That’s not right and we need to make a change’.”*

(ULR, CWU)

# Conclusions

The substantial investment the Government and trade union movement have made in union learning has the potential to divert unions away from tackling collective and industrial issues and promoting political education into delivering the Government's learning and skills agenda. However, the interviews with national officers conducted for this research suggest that unions are both beginning to integrate learning with their organising efforts and focusing on learning not just as a recruitment tool, but as a vital component in rebuilding and revitalising their union organisation.

In the absence of other learning available to adults, it is clear that trade unions have a key role in the delivery of lifelong learning in its widest sense both to empower members and facilitate political and social education – a role familiar to trade unionists in the past. In doing so, union learning broadens the union

role beyond narrow economic interests, widening the constituency of interest and supporting the processes of political and democratic participation.

Since this research concentrates only upon six unions, and within these, good practice in specific workplaces and branches, it cannot claim to be representative of wider trends within the union movement. However, it is indicative of some important developments and also demonstrates the potential of union learning for wider union activity, and union organising in particular.

While it does not suggest that union learning has “the necessary sense of scale and significance” to reverse union decline (McIlroy, 2008), it questions McIlroy's argument that union learning is an “implausible” route to revitalisation.

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# Appendix: Measuring the wider impact of union learning

The research suggests a number of measures that unions might use to evaluate the organising outcomes of union learning, in particular the extent to which union learning is having any impact upon membership, workplace organisation and activity. At the same time it cautions against a narrow focus upon targets.

## Retention: is learning being used to retain members?

- Measure: improved retention rates at workplace/organisational level.
- Caution: a number of issues affect retention (eg, changes in staff turnover).

## Recruitment: are learners being recruited into the union?

- Measure: increases in membership following union learning activity.
- Caution: it is difficult to establish causal relationships since workers might join for a range of reasons – are learners specifically asked to join, is there specific recruitment materials and forms?

## Recruitment: is learning engaging hard-to-recruit groups?

- Measure: increases in recruitment or engagement with the union by agency workers, migrant workers, part-time workers.
- Caution: although learning may engage with such workers, other factors (eg, employer hostility) may make them hard to actually recruit, particularly where there is no existing relationship with the employer.

## Recruitment: learning from learning

- Measure: is the union identifying what it is about learning that encourages members to join (ie, is it about face-to-face contact with union representatives) and can these lessons be generalised?

## ULRs: is union learning attracting new activists?

- Measure: numbers of ULRs in post and proportion who were not previously active in the union.
- Caution: have new ULRs been supported in activity?

## Diversity: is union learning leading to a more diverse union?

- Measure: proportion of new ULRs who are female/black/young compared to representatives of the union in general?
- Caution: is the union encouraging and supporting ULRs from these groups?

## Integration: are ULRs integrated into the wider union?

- Measure: proportion of ULRs taking on other representative roles in the workplace and beyond.
- Caution: to sustain union learning, the union needs dedicated ULRs – this is not necessarily a measure of how far ULRs are integrated into the union.

## Integration: are ULRs part of the union?

- Measure: proportion of ULRs attending meetings, on union executives or committees, engaged in other union activity, putting motions through the union.
- Caution: are there systems to induct new ULRs into the branch and to identify their role – are branches receptive?

## Sustainability: are there ULR structures within the union?

- Measure: learning coordinator posts, branch ULR committees, education teams, etc.

**Sustainability: is the work of union learning project workers leading to self-organisation?**

- Measure: frequency and nature of contact with UL project workers.
- Caution: ULRs need ongoing support structures.

**Branch activity: has learning strengthened the workplace/branch organisation?**

- Measure: is the branch more active in terms of meetings, number of activists, other union activity?

**The nature of learning: is learning empowering workers?**

- Measure: is the nature of the courses provided giving workers confidence in their work, but also beyond the workplace? Are Skills for Life courses structured around workplace issues?

**Employer engagement: is there employer support for learning?**

- Measure: number of Learning Agreements and/or Skills Pledges with time off for learning in place.
- Caution: agreements do not necessarily indicate activity.

**Collective bargaining: is union learning a collective bargaining issue?**

- Measure: Is union learning part of existing collective bargaining structures and agendas or is it a separate issue and dealt with by separate structures?
- Caution: full-time officers can substitute for ULR activity; ULRs need to develop negotiating skills.

**ULR Training: does ULR training include information on the wider union?**

- Measure: existence of element on wider union, its structures and other branch officer roles in ULR training.
- Caution: is the branch receptive?

**ULR Training: does ULR training have an organising element?**

- Measure: existence of an organising element in ULR training.
- Caution: needs to be supported by organisers or branch.

**Rep training: does reps' training include union learning?**

- Measure: existence of a union learning element in ULR training.
- Caution: needs to be integrated into UL structures.

**Reps' learning needs: do existing reps have the skills to be effective?**

- Measure – learning needs analysis of existing representatives which identifies and addresses the skills they need to be effective reps;

**Education**

- Measure: proportion of ULRs undertaking activist education.
- Caution: overwhelming ULRs in early stage of activism.

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