

DEVELOPING WORKPLACE LEARNING

Toolkit for trade unions



INTRODUCTION

Workplace learning is defined as activities to promote learning and training and personal development for workers in the workplace, and workers and employers alike have a common interest in developing an agenda for developing skills – it is a win-win situation for both.

According to a resolution approved by the Executive Committee of the European Trade Union Confederation, workplace learning 'provides workers with an opportunity to develop as active citizens, to acquire and update their knowledge, skills and competence and to improve their employability. Equally it provides employers with skilled workers to boost competitiveness, develop innovation and increase productivity'.

Although many employers invest in developing their employees' skills, many do not. So we in the European trade union movement have to be pro-active and move the issue of developing workers' skills up the agenda – in the workplace and across the European Union. And on this basis we agreed to set up a European project to support the development of workers' skills. Trade union workplace representatives, shop stewards, union learning representatives and works council members from six countries went on study visits to plants in Germany and the United Kingdom with the aim of exchanging information and experience about ways in which trade unions provide practical support for the development of workplace learning.

We have then been able to distil these discussions and present them in the form of a toolkit.

Thanks are due to all those who organised the study visits and participated actively in the discussions, and to Olaf Aschmann (Kompera GmbH) and Jeff Bridgford (King's College London) for preparing this toolkit.

We commend this toolkit to you, in the knowledge that it will contribute to the development of workplace learning and also to the role that trade unions can play in the workplace.

- **Bloculiu National Sindica – BNS**
- **Confederazione Italiana Sindacati Lavoratori – CISL**
- **Deutscher Gewerkschaftsbund – DGB**
- **European Trade Union Confederation – ETUC**
- **IndustriAll**
- **Конфедерация на независимите синдикати в България – КНСБ**
- **Trades Union Congress – TUC**
- **Union General de Trabajadores – UGT**



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The content does not reflect the official opinion of the European Union. Responsibility for the information and views expressed therein lies entirely with the author(s).

USER'S GUIDE

Who is this toolkit for?

This toolkit is for trade union representatives at the workplace, shop stewards, union learning representatives and works council members, so that they are better equipped to support the development of workplace learning. It will enable them to advise and support workers, union members and non-members alike, and enter into a dialogue and negotiate with employers on the subject of workplace learning.

What is in the toolkit?

This toolkit presents a six-step approach to developing workplace learning.

- Step 1** Preparing the ground for learning
- Step 2** Connecting to your trade union
- Step 3** Entering into a dialogue with workers
- Step 4** Turning workplace training needs and experiences into trade union demands
- Step 5** Entering into a dialogue with employers
- Step 6** Reconnecting with workers.

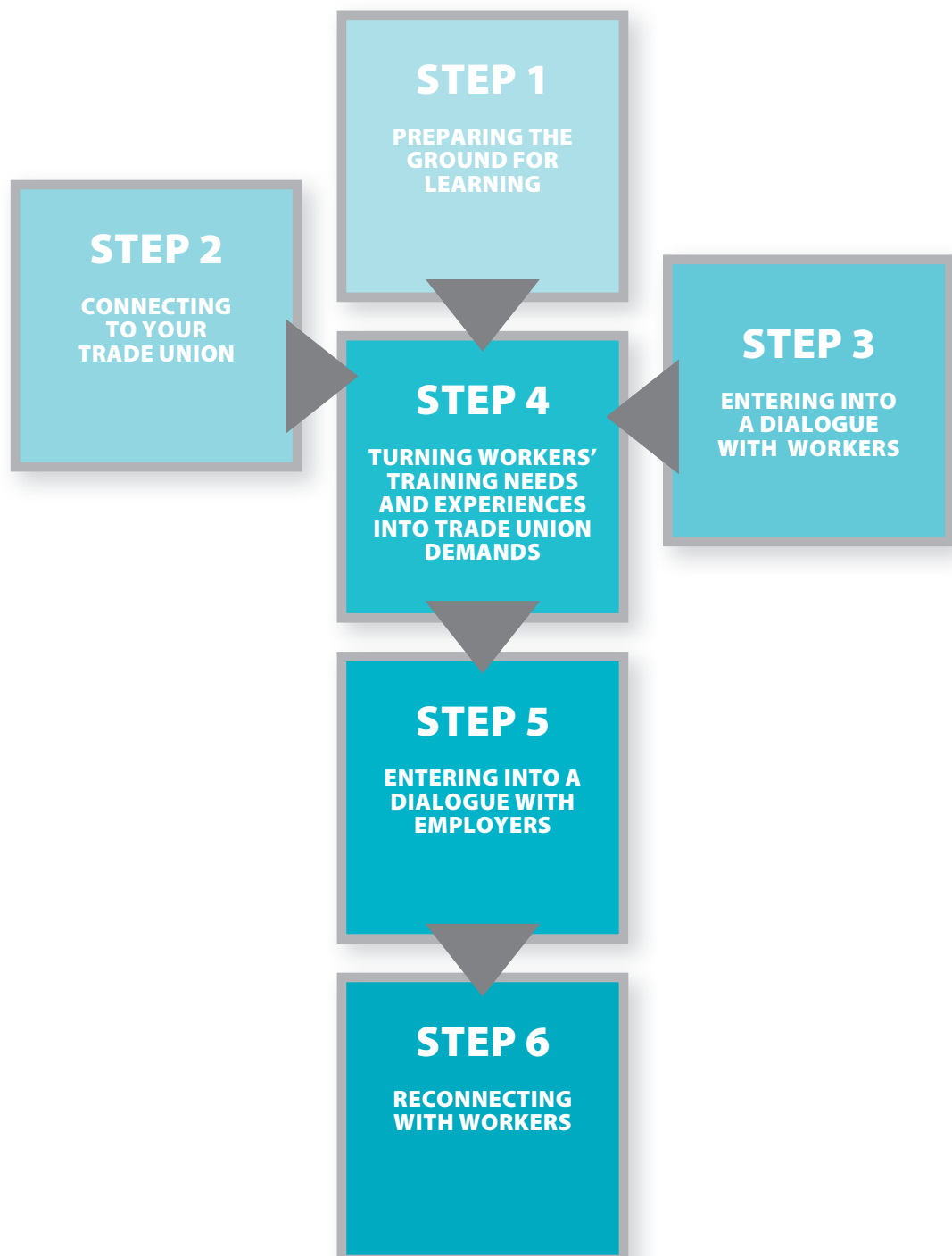
How should the toolkit be used?

This toolkit provides a series of ideas and suggestions for supporting trade union representatives in their discussions and negotiations with employers on the subject of developing workplace learning.

These six steps provide for a strategic approach enabling trade union representatives to discuss and negotiate workplace learning with employers on an equal footing.

This toolkit can be used as a stand-alone resource or as support for a training course. It will be more effective if it forms part of a broader trade union strategy to develop workplace learning.

THE SIX-STEP APPROACH TO DEVELOPING WORKPLACE LEARNING



STEP 1/ PREPARING THE GROUND

If you are going to support workers, trade union members and non-members alike, and negotiate with employers on the subject of developing workplace skills, you will need to prepare the ground, to gather the evidence, so that you are a credible and authoritative advocate for workplace learning.

First of all you need to know what the present environment for learning is in your workplace. This will enable you to put forward an effective case to the employer.

Rights to workplace learning

- What rights to training do workers have?
- Are they underpinned by law or collective agreements signed by employer and trade unions?
- Do they allow for time off for training? – If so, is it funded?
- Are other costs funded?

Existing company provision for workplace learning

- What type of workplace learning already exists?
- Who is it for?
- What form does it take?
- How is it negotiated?
- Who decides?

To help you gain a better understanding of the general situation as regards training in your workplace, please consult with other trade union colleagues and answer as many questions in the following templates as you can:

- Step 1a/Preparing the ground for learning – rights to workplace learning
- Step 1b/Preparing the ground for learning – existing provision for workplace learning.

The knowledge and insights gained will provide you with a clear focus for future steps to build a case for developing workers' skills in your workplace.

STEP 1A/ PREPARING THE GROUND FOR LEARNING

Rights to workplace learning

1 Regulatory framework base for workplace learning

1.1 Is workplace learning covered by law?

☐ YES ☐ NO

1.2 Is workplace learning covered by collective agreement?

☐ YES ☐ NO

2 Types of workplace learning covered by the law/collective agreements

☐ Vocational – job related

☐ Basic skills – e.g. numeracy, reading, writing, computer skills

☐ Personal development – e.g. improving self-confidence, developing talents

3 Workers eligible for workplace learning

3.1 Which workers are eligible for workplace learning? Please give details

☐ All

☐ Full time

☐ Part time

☐ White collar

☐ Blue collar

☐ Fixed-term contract

☐ Indefinite contract

3.2 Which workers are not eligible for workplace learning? Please give details

4 Provision of time off for workplace learning

☐ none

☐ 1-5 days

☐ 6-10 days

☐ more than 10 days

5 Remuneration for time off for workplace learning

☐ completely

☐ partially

☐ not at all

6 Other costs for workplace learning

6.1 Are any other costs reimbursed?

☐ YES ☐ NO

6.2 If yes, which costs? Please give details

7 Understanding rights to workplace learning

7.1 Do workers know their rights to workplace learning?

☐ YES ☐ NO

7.2 Do managers know what rights workers have to take up workplace learning?

☐ YES ☐ NO

STEP 1B/ PREPARING THE GROUND FOR LEARNING

Existing provision for workplace learning

1 Company level agreement on workplace learning

1.1 Is there an agreement on learning in your workplace?

☐ YES ☐ NO

2 Types of workplace learning supported in your company

- ☐ Vocational – job related
☐ Basic skills– e.g. numeracy, reading, writing, computer skills
☐ Personal development – e.g. improving self-confidence, developing talents

3 Workers eligible for workplace learning

3.1 Which workers are eligible for workplace learning? Please give details

3.2 Which workers are not eligible for workplace learning? Please give details

4 Provision for time off for workplace learning

- ☐ none ☐ 1–5 days
☐ 6–10 days ☐ more than 10 days

5 Remuneration for time off for workplace learning

- ☐ completely ☐ partially ☐ not at all

6 Other costs for workplace learning

6.1 Are any other costs reimbursed? If yes, please give details

7 Process for requesting workplace learning?

7.1 Is there a company policy for requesting workplace learning?

☐ YES ☐ NO

7.2 If yes, is it clear?

☐ YES ☐ NO

7.3 If yes, what is the process for requesting workplace learning? Please give details

8 Workplace learning provision

8.1 Is there a training department in your workplace?

☐ YES ☐ NO

8.2 If yes, what resources does it provide? Please give details

9 Forms of workplace learning 1

9.1 Is training done internally within your workplace?

☐ YES ☐ NO

9.2 If yes, what form does it take?

- ☐ Coaching/shadowing ☐ Classroom

10 Forms of workplace learning 2

10.1 Is training provided externally, outside the company?

☐ YES ☐ NO

10.2 If yes, who provides the training? Please give details

11 Financing workplace learning

11.1 Who finances learning/training in your workplace?

- ☐ Employer ☐ Public authorities ☐ Workers themselves
☐ Shared (employer/worker) ☐ Joint funds managed by trade unions and employers' organisations



STEP 2/ CONNECTING TO YOUR TRADE UNION

If you are going to support workers and negotiate with employers on the subject of developing workplace skills, you will need to connect to your trade union to discover what policies your trade union has, what documents it may have published, what support you could possibly obtain and who could provide you with advice to discuss and negotiate workplace learning.

To help you gain a better understanding of ways in which your trade union can provide support, please use **Step 2a/ Connecting to your trade union** – template on the following page.

STEP 2A/ CONNECTING TO YOUR TRADE UNION

TEMPLATE

Get in touch with your trade union and answer the following questions.

1 Trade union policy

1.1 Does your trade union have a policy on workplace learning?

1.2 Has your trade union negotiated agreements with employers on workplace learning?

2 Trade union documentation

2.1 Has your trade union published any information – brochures, fliers – on workplace learning?

3 Trade union support

3.1 Does your trade union have a network for the development of workplace learning?

4 Trade union colleagues

4.1 Do you have other trade union representatives and/or members in your workplace that are interested in developing workers' skills with you?



STEP 3/ ENTERING INTO A DIALOGUE WITH WORKERS

If you are going to support workers and negotiate with employers on the subject of developing workplace skills, you will need to enter into a dialogue with workers to find out what they want and need. Moreover it will be important to find out what experiences they may have had already. In this way you will be able to see how the process of human resources development functions in your workplace. Equality and diversity in workplace learning should also be considered by trade unions. Asking questions of workers about characteristics like gender, age and disability, if they are willing to share information, can help establish learning needs and reveal barriers.

Armed with this information you will be in a unique position to discuss and negotiate the development of workplace learning with your employer on an equal footing – on the basis of real information that s/he will not have.

Trade unions are in a position of trust, but it may be difficult to get into a discussion with workers. They may be working shifts, or part-time. They may be on short-term contracts. They may be working on different sites. They may not understand and speak your language very well. Moreover, their experience of formal schooling may have been a source of frustration and disappointment, and they may not want to be reminded of these times. In addition they may not want to talk about their skills, or rather lack of them.

So how are you going to overcome these potential hurdles? If the plant is small, it might be possible to meet them individually or in small groups and talk face-to-face. If so, do it in a discreet and private environment, so that they are at their ease and ready to tell you what they really want and need.

Don't forget however that entering into a dialogue with workers is as much about listening as it is about doing the talking yourself.

If your company is big, it might be possible to share this task with other trade union representatives. If not, it will be necessary to communicate in written form. It is possible that not all workers will have access to email, and this may need to be done by internal mail.

Whether orally or in writing, it will be necessary to have a basis for the discussion – a questionnaire – to ensure that you obtain the appropriate information. Moreover you will need to record and collect the information to enable you to make the case later with your employer.

To help you gain a better understanding of ways in which you can prepare a questionnaire to investigate workers' learning needs, please use **Step 3a/ Entering into a dialogue with workers** – template on the following page.

Two final points

If the company is big and the task of investigating all workers' needs is too ambitious, even with the support of other trade union representatives, start off modestly, in one or two departments. This could then be a basis for a first dialogue with employers, on the way to a company-wide campaign afterwards.

Some workers may be cautious about an initiative like this, so investigating their needs will provide an opportunity to advise and motivate fellow workers and to explain what workplace learning could be on offer and what it could lead to.

STEP 3A/ ENTERING INTO A DIALOGUE WITH WORKERS

Survey questionnaire to investigate learning experience and needs

TEMPLATE

This survey questionnaire is confidential. It is designed to investigate individual and collective workplace learning needs, as a basis for a dialogue with the employer. All information about individuals' views will be kept strictly confidential.

1 Personal details

Name	Job title
Department	Contact details
Formal qualifications	

PREVIOUS WORKPLACE LEARNING

- 2 Has anyone consulted you before about your workplace learning needs? ☐ YES ☐ NO
- 2.1 If yes, did this lead to an opportunity for workplace learning? ☐ YES ☐ NO

3 If you have had an opportunity for workplace learning

3.1 What did you take up? Please give examples _____

3.2 When did it take place? _____

3.3 What is your opinion of it? _____

3.4 Have you been able to use the skills that you acquired in your daily work? ☐ YES ☐ NO

3.5 Did it lead to some form of qualification? ☐ YES ☐ NO

3.6 If yes, please give details _____

3.7 Did it lead to some form of improvement in pay or working conditions? ☐ YES ☐ NO

3.8 What would you propose to make it more useful? _____

PRESENT WORKPLACE LEARNING NEEDS

- 4 In your area of work are there problems that could be solved by improvements in workplace learning? Please provide details _____

5 What workplace learning would you personally be interested in taking up?

- ☐ Vocational – job related
- ☐ Key competences – e.g. numeracy, reading, writing, computer skills
- ☐ Personal development – e.g. improving self-confidence, developing talents

6 Please give more specific details about the type(s) of workplace learning that you would be interested in taking up

7 Why would you want to take up this workplace learning?

8 Where would you like this workplace learning to take place?

IF THIS IS A WRITTEN SURVEY – PLEASE SEND THE QUESTIONNAIRE BACK TO

NAME	RETURN BY DATE
ADDRESS	



STEP 4/ TURNING WORKPLACE LEARNING NEEDS AND EXPERIENCES INTO TRADE UNION DEMANDS

If you are going to support workers and negotiate with employers on the subject of developing workplace skills, you will need to turn workplace learning needs and experiences into trade union demands.

Now you have all the elements that can provide the basis for your trade union demands:

- **information on rights to workplace learning**
- **examples of existing company provision for workplace learning**
- **documentation and names of resource persons from your trade union**
- **lists of workers that have undertaken previous workplace learning**
- **types of workplace learning that workers have taken up**
- **their opinion on the workplace learning that they have taken up**
- **their present workplace learning needs**
- **numbers of workers who are interested in taking up workplace learning**
- **reasons why workers want to take up workplace learning**
- **information on human resource processes and how they can be improved.**

This is a veritable treasure trove of information. You now have an overall view of the way in which an important element of human resources development, workplace training, is dealt with in your company. It puts you in a commanding position. You probably know more about the learning environment in your workplace than your employer, and so you are in a strong position to be able to enter into dialogue with him or her on an equal footing.

The next step is to turn this information into trade union demands and to prepare for the dialogue with the employer.

To help you prepare trade union demands for the dialogue with the employer, please use **Step 4a/ Turning workplace learning needs and experiences into trade union demands** – template on the following page.

STEP 4A/ TURNING WORKPLACE LEARNING NEEDS AND EXPERIENCES INTO TRADE UNION DEMANDS

TEMPLATE

1 Overall trade union aim

1.1 How can you best support a strategy for the development of workplace learning?

2 Arguments – Benefits

If a strategy for the development of workplace learning can be established, what would be the benefits for

2.1 workers

2.2 your employer

2.3 your trade union

2.4 how can this list of benefits generate a win-win situation?

3 Arguments – Sustainability

3.1 What is needed to ensure the sustainability of a workplace learning strategy?
Please give details

3.2 How can we measure the effectiveness of training?

3.2.1 the number of certificates of competence

3.2.2 the quality of certificates of competence

3.2.3 other

3.2.4 If yes, please give details

☐ YES	☐ NO
☐ YES	☐ NO
☐ YES	☐ NO

4 Arguments – Measures

4.1 What measures need to be taken in the short term (12 months)? Please give details

4.2 What measures need to be taken in the medium term (12-36 months)? Please give details

5 Arguments – Costs

5.1 What costs would be incurred?

5.2 How can these costs be justified?

5.3 How can these costs be funded?

5.4 Is a division of costs between the employer and the workers feasible?

6 Arguments – Dialogue with the employer

6.1 Who will present the trade union arguments to the employer?

6.2 What arguments might the employer use and what counter arguments will you need?

7 Results

7.1 What would be an acceptable result of this dialogue? Please give details

8 Next steps

8.1 What needs to be done after the meeting with the employer?

8.2 Who is going to do it?



STEP 5/ ENTERING INTO A DIALOGUE WITH EMPLOYERS

If you are going to support workers and negotiate with employers on the subject of developing workplace skills, you will need to enter into a dialogue with employers so as to improve the development of workplace learning in your company.

It is important that the first step is a success, as it will set the tone for future discussions, and so the first point to make with the employer is that you both have a common interest in developing an agenda for developing skills – it is a win-win situation for both. Workplace learning provides employers with skilled workers to boost competitiveness, develop innovation and increase productivity. It also provides workers with an opportunity to develop as active citizens, to acquire and update their knowledge, skills and competence and to improve their employability.

Ensure that you have considered the arguments that the employer will put and have a series of counter arguments that you can present.

The best guarantee for a sustainable workplace learning strategy will be to obtain a workplace learning agreement to set up a joint employer-trade union committee which in turn will prepare a learning programme. In this way, with the support of the employer, it will be possible to make sure that workplace learning has a stable place within the company.

- **What needs to go into a learning agreement that could be the basis for a workplace learning programme?**
- **Who are the partners to the agreement?**
- **What would the joint employer-trade union committee do?**
- **Who will be a member of this joint employer-trade union committee?**
- **How will this workplace learning strategy be funded?**

To help you in considering the content for a company workplace learning agreement, please use **Step 5a/ Entering into a dialogue with employers – preparing a workplace learning agreement** – template on the following page.

STEP 5A/ ENTERING INTO A DIALOGUE WITH EMPLOYERS

Preparing a workplace learning agreement

TEMPLATE

1 Partners

1.1 Who is party to the agreement - employer and trade union representatives?

2 Scope

2.1 What is the organisational context - link to regional/national agreements?

3 Aims

3.1 What are the aims of the agreement? Examples:

- Building an effective workplace learning partnership
 - Making workplace learning opportunities accessible for all employees
 - Encouraging and supporting workers to take up workplace learning activities
 - Identifying workplace learning needs of all workers
 - Producing a workplace learning programme
 - Monitoring the success of the workplace learning programme
 - Making best use of existing facilities to act as learning centres
 - Liaising with outside providers
 - Maximising funding opportunities available through internal, external, local and national organisations
 - Contributing to improving the performance of the company through the enhanced skills of its workers
-

4 Priorities for training/learning

4.1 What are the priorities for workplace learning linked to company objectives?

4.2 What are the priorities for workplace learning linked to funding possibilities?

4.3 What are the priorities for other types of workplace learning?

5 Joint employer-trade union committee for workplace learning

5.1 How is the process managed in terms of

- Roles ■ Membership ■ Meetings ■ Responsibilities
-

6 Rights and obligations of the partners

6.1 Who does what – employer and trade union representatives?

7 Trade union representatives

7.1 Who are the trade union representatives?

7.2 What resources do they have?

8 Equal opportunities

Commitment to equal opportunities

9 Confidentiality

Commitment to confidentiality



STEP 6/ RECONNECTING WITH WORKERS

If you are going to support workers and negotiate with employers on the subject of developing workplace skills, you will need to reconnect with workers.

The important thing to remember is that this toolkit has been prepared to enable you to advise and support workers, trade union members and non-members alike, and enter into a dialogue and negotiation with employers on the subject of workplace learning.

The workers in your workplace are centre stage, and it is important to identify their workplace learning needs, to motivate them to undertake workplace learning activities and then to translate these needs into trade union demands which can be supported by the employer.

Without their active and passive support this initiative will not succeed, and so it is essential to keep them fully on board throughout.

Keep them informed, both members and non-members, about the results of the survey. Explain the reasons for the different priorities that you have made. Be sure to tell them about the results of the dialogue with the employer and the content of the workplace learning agreement. And of course present them with the fruits of all your work – the new workplace learning strategy, the new workplace learning agreement and the new workplace learning programme.

Don't forget this

Workers who have gone through this process and had a chance to learn new skills might want to become new trade union members.

Trade union members who have gone through this process and had a chance to learn new skills may want to become trade union representatives responsible for developing a workplace learning strategy with you.

To help you in considering how to reconnect with workers, please use **Step 6a/ Reconnecting with workers** – template on the following page.

STEP 6A/ RECONNECTING WITH WORKERS

TEMPLATE

Points to consider in any communications with workers

1 What is the trade union goal for the development of workplace learning in your company?

2 What did you do to achieve this goal?

3 What problems did you encounter?

4 How did you deal with these problems?

5 What were the results of the survey questionnaire?

6 What was the outcome of the dialogue with the employer?

7 What is to be done next?

8 Who is going to do it and what further support will be required?



GLOSSARY AND NATIONAL CONTACTS

Terminology

The unionlearn Working for Learners handbook includes a useful Jargon Buster
www.unionlearn.org.uk/publications/working-learners

People to contact

Matt Creagh
Apprenticeship Delivery Officer
mcreagh@tuc.org.uk
020 7079 6948

TUC Trade Union Directory
(TUC member organisations)
www.tuc.org.uk/britains-unions

Useful web links (in alphabetical order)

Apprenticeships
www.apprenticeships.gov.uk

Campaign for Learning
www.campaign-for-learning.org.uk

European Commission (Vocational Education and Training - VET)
ec.europa.eu/education/policy/vocational-policy/

Further education and skills
www.gov.uk/government/topics/further-education-and-skills

Learning and Work Institute
www.learningandwork.org.uk

National Careers Service
nationalcareersservice.direct.gov.uk

Sector Skills Councils directory
fss.org/sector-skills-council-body/directory-of-sscs/

TUC
www.tuc.org.uk

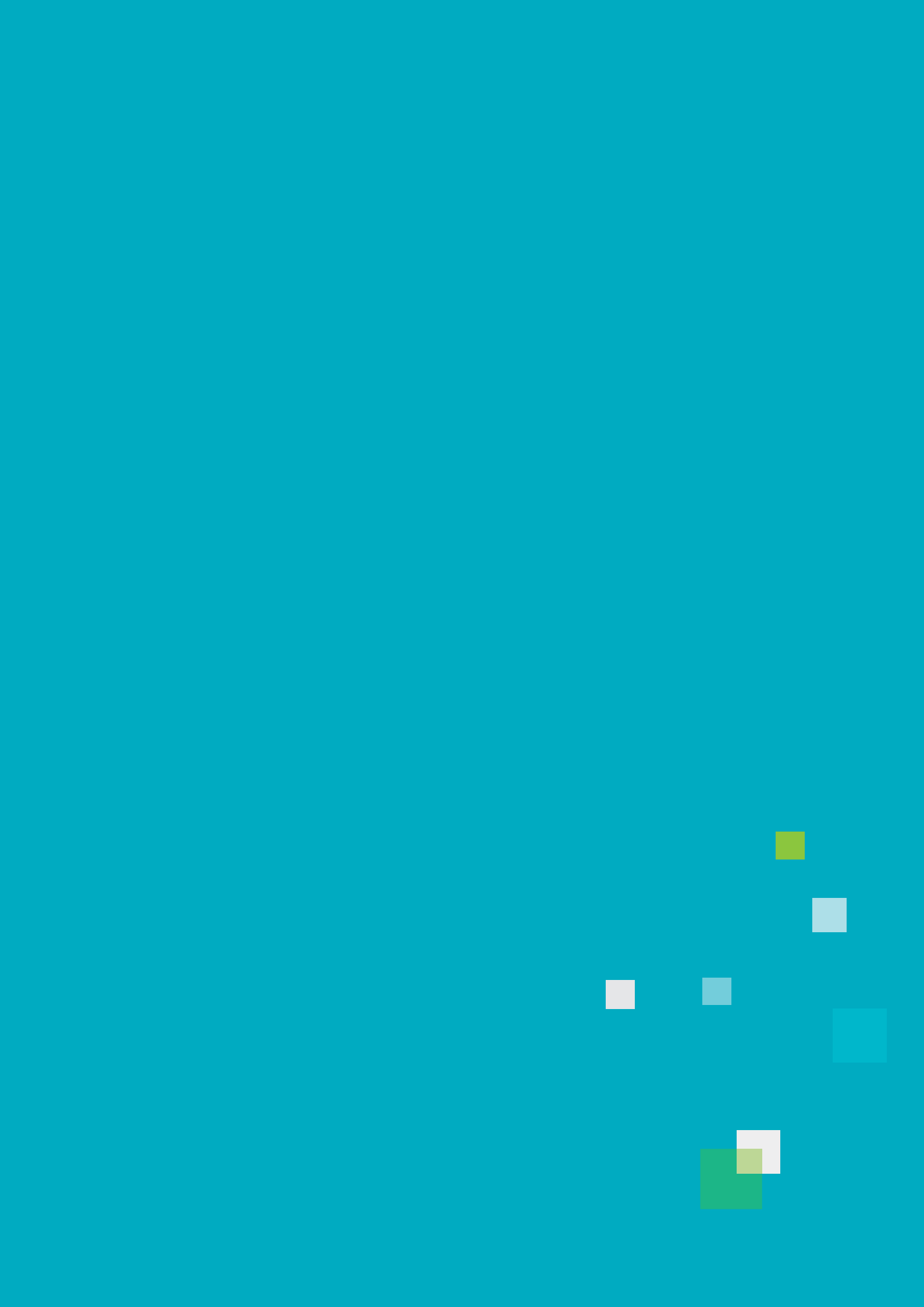
TUC Education (training for union reps)
www.tuceducation.org.uk

UK Commission for Employment and Skills – Labour Market Intelligence
www.gov.uk/government/collections/local-labour-market-data

Unionlearn (the Learning and Skills organisation of the TUC)
www.unionlearn.org.uk

Unionlearn publications (including the Learning Rep magazine)
www.unionlearn.org.uk/publications

Unionlearn briefing on Sector Skills Councils and Industrial Partnerships
www.unionlearn.org.uk/sector-skills-councils-industrial-partnerships





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