

Union Learning Impact Report
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Introduction

This report sets out two elements of research undertaken for unionlearn by the Centre for Employment Relations Innovation and Change (CERIC), at the University of Leeds. The first element is an employer survey, supplemented with qualitative interviews with sixteen employer bodies and sector skills councils. The second element reported is an analysis of union learner records.

The employer survey explored experiences and perspectives of union-led learning. The 2013 study follows-up the same employers that took part in a similar survey conducted in 2009/2010 as part of a major evaluation of the Union Learning Fund (ULF) and unionlearn. This gives useful insights into how the context, experience and outcomes of union learning have changed over the last few years. The employer survey was supplemented with 16 in-depth qualitative interviews undertaken in Spring 2013 with representatives of employer-led bodies. The survey reports on employer perspectives of the impact of union learning on training practices, learner demand and organisational performance.

Data on learners is reported in terms of demographics and learning outcomes through analysis of individual learner records that provide data on learners participating in multiple learning episodes, offering the opportunity to consider the nature of learning progression and who makes that progression.

Key points: employer survey

The employer survey explored joint activity between employers and unions on learning and outcomes associated with this activity. Activity was measured in relation to joint work in ten areas: workplace learning centres, training needs analysis, engaging non-traditional learners, promoting the benefits of training, funding for work related courses, funding for non-work related courses, paid time-off for employees to meet with ULRs, a focus on basic skills needs, a focus on apprenticeship programmes.

The degree of employer involvement with unions on learning was high although there was a decrease in activity levels across some domains (notably workplace learning centres) between the two surveys.

Just under a quarter of workplaces (24 per cent) were currently involved with a recognised trade union on a ULF project, while two-thirds (68 per cent) reported that they had previously been involved in a ULF project.

The ULF is a driver of employer engagement with unions around the learning agenda. Those currently involved with a ULF project were more likely to be involved with all types of union learning activity. These findings are statistically significant.

The degree of employer involvement with unions on learning was associated with four factors: involvement in the ULF, the extent to which employers valued ULRs, the extent to which employers valued the ULF and the apparatus that had been established to support union learning activity.

There is some evidence of a decline in the coverage of ULR activity with a smaller proportion of all firms reporting ULRs present in the workplace, notably in the private sector. However, the total numbers of ULRs reported across the sample has increased.

Those workplaces with mechanisms for joint engagement such as learning committees or learning agreements **and** which reported valuing the ULF and ULRs were more likely to report that they were involved with all of the different types of union learning activities.

However, the institutionalisation of union learning through mechanisms such as management-union learning committees and learning agreements may also have declined over the period.

There is some evidence of an increased employer contribution to workplace learning in terms of management time and in terms of other in-kind contributions. Less than half (45 per cent) reported a cash contribution from the employer towards union learning activity. Private sector respondents and those that reported 'valuing the ULF' were more likely to be associated with making a cash contribution.

The level of employer contribution has held up very well between 2010 and 2013. The most significant employer contribution is towards ULR time, reported by nearly nine out of ten (89 per cent) of respondents.

Few respondents were able to answer with a precise figure of these contributions. Where employers responded the cash contribution ranged from as low as £200 to a high of £1 million.

Only around one in ten workplaces (11 per cent) reported that they undertook any form of cost-benefit analysis on their engagement in and support for union learning activity. Nonetheless, a large proportion of respondents that felt their organisation gets a return on investment in union learning activity. Around three quarters reported that this was the case (74 per cent).

Two thirds of respondents state that impact of union learning on employee demand for learning has increased amongst those with little history of taking part in learning/training (64 per cent). Just under a quarter (24 per cent) reported increased demand for learning amongst those with high skills. These figures are considerably higher for employers with current ULF projects (90 per cent and 4 per cent respectively).

The impact of union learning on employer learning practices remains high, indeed in some areas seems to have increased. The one notable area where its influence seems to have declined is in relation to employer expenditure of training. However, increases are reported for the take up of non-job related training, continuing professional development, the number of apprenticeship and equality of access to learning and training opportunities.

The impact of union learning on organisational indicators suggest that staff morale, improvements in staff turnover and to a lesser extent levels of trust in the workplace have increased. A third of workplaces also report that union learning has contributed to improvements in the quality of work.

Logistic regressions tested for statistically significant associations between reported outcomes and range of inputs and union learning activities. The existence of workplace supports such as a learning committee or negotiation on training are associated with specific outcomes such as greater equality in access to learning and staff morale.

There is some evidence of declining activity. However, this is strongly related to the fact that a smaller proportion of the panel of employers are currently involved in ULF projects. While employers say that they will sustain activity without the ULF, the evidence suggests that activity is higher for those employers that currently have a project compared to those that do not.

The multivariate analysis summarises those factors that make a difference to engagement and outcomes. This shows that (when all other factors are considered equal), certain features matter. The degree to which employers value the ULF or

ULRs is a key factor, as is the set up of a learning centre and negotiation over training. These seem to be more important than general organisational training policy per se.

Where employers have training budgets and formal training policy there is a negative association with whether they report union learning has having had a positive impact. This suggests that union learning and strong organisational training practice may not be complimentary and that unions make a difference where employers have relatively poor training practice or are not that strategic about staff development.

The interviews with employer bodies and SSCs indicated a wide range of union involvement in government funded including those overseen by the UK Commission on Employment and Skills and individual SSCs. Particularly, ULRs and union learning project workers, are seen as highly valuable as a means of raising awareness of and demand for skills. Apprenticeships were a key area where the role of unions was valued. A range of sectoral examples were highlighted in health, energy, engineering, construction and the creative industries.

The value of working with unions was linked to the emphasis placed by unions on quality and equality, on longer term investment in skills, in promoting corporate social responsibility, in addressing skills shortages, in retaining human capital investments during periods of low demand and in sharing industry expertise and intelligence.

Key points: learner data analysis

The proportion of learners with a prior level below Level 2 (NQF) was 47.9 per cent, significantly higher than the benchmark figure of 29 per cent taken from UK workforce data. Just under a third (32.3 per cent) of learners had prior levels of qualification at Level 3 or above.

Level 2 programmes learning made up 40 per cent of all learning, just over a third at Level 1; less than 10 per cent was non-accredited and 12 per cent was learning at Level 3 or higher.

Just over a third (38.8 per cent) of learners progressed in terms of participating in learning that was at least one level higher than their prior level of qualification. This figure rises to almost three quarters of learners with a prior level of qualification below Level 2.

The data indicate that union learning engages learners from a broad range of educational background. However, participation and achievement (in terms of qualification gain) appears more likely to be achieved by those with lower prior levels of qualification.

Logistic regressions explored the association between progression and learner attributes and activity. These models indicate that women are between 1.60 and

1.62 times (for unweighted and weighted data respectively) more likely than men to participate in union learning at a higher level.

Across all variables in the model, progression appears to be the strongest predictor of achieving a high level of union learning. The strongest predictor of progression, however, is the extent of multiple learning. The more types of learning undertaken, the more likely learners are to progress. Suggesting that within union learning participation in a mix of information advice and guidance (IAG), non-vocational and vocational learning over time supports learner progression.

An overall picture emerges that union learning is effective in engaging a relatively high proportion of learners with lower education backgrounds (when compared to national benchmarks). When learners are brought into learning via the union learning route, learners participating in skills for life and level 1 programme have a high likelihood of progression in terms of learning levels or 'skills-uplift'.

It is also important to note that a third of the learners brought into learning via the union route have higher level skills. The methodology adopted here means that progression into other higher level skills (FE or HE routes) is not possible.

Employers' survey 2013

Introduction

In late 2012 unionlearn commissioned the Centre for Employment Relations Innovation and Change (CERIC), at the University of Leeds, to conduct a survey of employers' experiences and perspectives of union-led learning. The aim was for a follow-up to a large-scale survey conducted in 2009/ 2010 which formed part of a major evaluation of the Union Learning Fund and unionlearn. The original survey elicited 415 responses from a sample of 975 workplaces that were identified as having had some form of engagement with union learning – a response rate of 43 per cent. The full methodology of this survey is detailed in Stuart et al (2010).

Methodology

The follow-up survey was undertaken by a team of researchers contacting all the 415 employers that had responded to the original survey. Many of the original contacts had moved on, suggesting a potentially high rate of respondent attrition. The survey was conducted for a 5 week period during January and February 2013 and elicited 169 responses – a 41 per cent response rate.

While the sample for analysis is smaller for the second tranche, the number of responses is still relatively large compared to previous attempts at surveying employers for evaluations of union-led learning. There are two notable benefits of this survey. First, all workplaces surveyed have a known track record of engagement with union learning. They can be thought of as the workplaces where union learning has been most developed and therefore should be most indicative of the experiences of employers and of identifying the likely benefits that may accrue for employers. Second, the survey employers are all reporting the findings of continuing workplaces, allowing for a comparison between the same firms surveyed at two points in time. This gives some useful insights into how the context and experience of union learning may have changed over the last few years.

The original survey findings elicited an even response from public (51 per cent) and private (47 per cent) sectors. The 2013 survey was more skewed towards the public sector, with 59 per cent of managers at public sector workplaces responding compared to 38.7 per cent of private sector workplaces. To a large extent this is more reflective of the overall balance of union membership. The increased percentage of public sector workplaces also raises the possibilities that the findings will be more influenced by the reductions in public spending that are impacting more disproportionately on the public sector.

The original survey covered workplaces that employed 941,000 employees. The 2013 findings relate to 683,106 employees. In terms of the skills profile, of those that responded, around six in ten employed a workforce that was mainly qualified to Level 2 or below.

Survey findings

Economic change

The workplaces surveyed had engaged in a degree of workforce entrenchment during the 12 months prior to the survey.

- Just over six out of ten (61 per cent) had cut the number of people employed
- Employment remained the same in a quarter of cases (25 per cent)
- Employment had increased in 14 per cent of cases.

These findings were significantly influenced by sector. Eight out of ten public sector workplaces reported that numbers employed had been cut compared to a third of their private sector counterparts. Conversely, private sector workplaces were more likely to have increased employment (in a quarter of cases).

Investments in training had changed to a variable extent. Just under a quarter (24 per cent) of workplaces reported that levels of investment in training had increased, while just over a quarter (26 per cent) stated that training investment had decreased. While there was a notable public sector effect – such workplaces more than twice as likely to report levels had been cut – this finding was not significant as the 5 per cent confidence level². There is some evidence of a pick-up in private sector investment in training since the 2009/10 survey.

Industrial relations arrangements

Respondents were generally favourably disposed towards unions. Two thirds (66 per cent) described management's attitudes towards trade membership among employees as favourable, while two thirds were neutral. No respondents were not in favour. There was a clear sectoral effect, with 73 per cent of public sector respondents in favour compared to just over half (54 per cent) of private sector respondents.

Table 1 details the levels of negotiation, consultation and information sharing with union representatives across a range of factors. The first column of figures relates to the 2013 survey, the second column the same workplaces from the original survey (referred to as 'panel') and the final columns the general findings from the 2009/10 survey. There is some evidence that negotiation and consultation over training declined slightly in the workplaces surveyed over the last three years. There is no statistically significant difference between public and private sector workplaces, even though private sector respondents are twice as likely (just under a quarter) to report no involvement at all on training.

² In the WERS 2011 survey, 16% of all employers reported that training budgets had been cut with 32% of public and 14% of private sector employers giving this response (van Wanrooy et al 2013).

Table 1: *Negotiation, consultation and information sharing with union representatives (percentage)*

Area	Negotiation			Consultation			Inform			No involvement		
	2013	Panel	2010	2013	Panel	2010	2013	Panel	2010	2013	Panel	2010
Pay	62	70	69	35	22	22	2	4	5	1	3	4
Hours of work	55	63	60	39	29	30	3	4	5	3	4	4
Grievance/ disciplinary procedures	30	44	43	62	53	48	5	3	6	3	2	3
Pension entitlements	41	41	43	47	30	28	7	15	17	5	14	12
Health and safety	30	31	35	59	63	57	7	2	5	4	5	3
Equal opportunities/ diversity	27	31	28	61	56	55	7	8	10	5	6	6
Training	22	23	27	41	46	41	20	17	19	18	15	13
Performance appraisal	14	11	15	41	43	36	22	21	20	25	25	30
Recruitment and selection	9	11	13	32	37	30	24	24	26	36	28	31

Table 2 reports the proportion of staff given time off for training in the last 12 months. There is little evident change, although workplaces that have trained just a small percentage of staff (less than fifth of the workplace) have increased in number. Workplaces in the public sector tend to train higher proportions of staff, though this is not a significant finding.

Table 2: *Proportion of staff given time off for training in last 12 months (percentage)*

	2013 survey	Panel survey 2010	General survey 2010
100 %	19	19	22
80-99 %	19	21	17
60-79 %	22	20	19
40-59 %	9	17	13
20-39 %	12	10	13
1-19 %	19	12	15
0	1	1	2

Employer Involvement with Union Learning

The workplaces surveyed, by definition, had a track-record of engagement with unions around the learning agenda. Just under a quarter of workplaces (24 per cent) were currently involved with any recognised union on a ULF project, while two-thirds (68 per cent) reported that they had previously been involved in a ULF project. Of the total sample in the original survey just under half (46 per cent) were involved in a ULF project at the time of the survey, a finding that was similar for the sub sample of workplaces. There was no public sector effect. In other words, fewer employers were currently involved with a ULF project.

The evidence is to some extent suggestive of a decline in employer engagement with the ULF, though this may have just as much to do with the specific terms of reference of the ULF rounds since the previous survey. There is also evidence of a declining coverage of ULR activity. Just under three quarters of workplaces (73 per cent) reported that they had union reps with responsibility for union learning, that is ULRs, compared to 89 per cent of these workplaces in the earlier survey. ULRs were significantly more likely to be found in the public sector, with 83 per cent of public sector respondents stating that they had ULRs compared to 59 per cent of private sector workplaces. Previously 90 per cent of these public sector workplaces had ULRs and 86 per cent of private sector workplaces reported that they had ULRs. There has therefore been a noticeable decline in ULR activity in the private sector. Curiously, the total numbers of ULRs reported increased in these workplaces over the period, from 1,917 to 2,000.

Employers were asked in the current survey whether they valued the ULF and the activities of ULRs. *This question was not asked in the previous survey.* The findings are reported in Table 3. The findings show some agreement that both sets of activities are valued, though the role of ULRs slightly more so. There was no sector effect.

Table 3: *Is the activity of the ULF and ULRs valued (%)*

	Strongly agree	Agree	neither	Disagree	Strongly disagree	Count
ULF	16	29	47	7	1	166
ULRs	21	35	33	8	2	166

There was evidence that the institutionalisation of union learning may also have declined over the period. Joint management-union learning committees were reported in 43 per cent of workplaces compared to just over half previously (54 per cent). There was no sectoral effect. Learning agreements were reported by 61 per cent of workplaces previously and a little more than half in the (52 per cent) in the current survey. Learning agreements are significantly more likely in the public sector. They have declined in propensity to a marked extent in the private sector.

Turning to the specific types of initiatives that employers have engaged with unions around, there is also evidence of some declining practice, as the findings in Table 4 show. The recent survey findings are compared to those of the same workplaces conducted in 2010, where similar questions were asked. The only area where a respondents reported an increased level of activity is in relation to “funding employees to take part in non-work related courses”, where exactly half of respondents to the 2013 survey reporting that they had done this.

However, it is important to note that not all the questions were framed to facilitate direct comparison and, even where they were, the findings generally suggest a high degree of employer involvement with specific union learning initiatives. The most highly cited involvement related to the identification of individual training needs (79 per cent), addressing basic skills (77 per cent), arranging any form of training for employees (76 per cent), raising awareness of the benefits of training (76 per cent), increasing participation of non-traditional learners in training activity (75 per cent) and providing employee time-off to discuss learning with ULRs (68 per cent). Less frequently cited involvement related to the funding of employees to take work- (58 per cent) and non work-related (50 per cent) courses, the development of apprenticeship programmes (43 per cent) and the development of joint management learning centres (41 per cent). It needs to be recognised, however, that once a learning centre has been established respondents may have considered this historical activity and not responded positively to the current survey even though such a centre exists.

Table 4: *Employer involvement with specific union learning initiatives (per cent)*

	2013	2010 Panel	Count
Joint union-management learning centre	41 (70*)	56	168
Identifying individuals' training needs	79 (93*)		169
Arranging any training for employees	76 (85)		169
Increasing participation of non-traditional learners in training activity	75 (95*)		167
Raising awareness of the benefits of training	76 (93*)		169
Funding employees to take work-related courses	58 (73*)	78	169
Funding employees to take part in non work-related courses	50 (63*)	48	169
Employee time-off to discuss learning with ULRs	68 (90*)	73	168
Addressing basic skills gaps	77 (95*)	79	169
Development of apprenticeship programmes	43 (58*)	46	169

Figures in brackets relate to where there is current involvement in a ULF project. * is statistically significant (Chi Square) at < 0.05.

There were only limited sectoral effects in terms of the ways in which workplaces had been involved with unions on learning. Public sector workplaces were more likely than private sector workplaces to be associated with activities directed at addressing basic skills gaps and provisions for employee time-off to discuss learning with ULRs, while private sector workplaces were more likely to report that they had been involved with the development of a joint union-management learning centres.

Far more pertinent in terms of influencing the degree of employer involvement with unions on learning was the level of involvement in the ULF, the extent to which employers valued ULRs and the ULF and the prevailing apparatus that had been established to support union learning activity. Those workplaces that had learning committees or learning agreements and that reported valuing the ULF and ULRs were more likely to report that they were involved with all of the different types of union learning activities. There was also a clear association with whether respondents' workplaces were currently involved with a ULF project. These findings are reported in Table 4 (in brackets) with the levels of statistical significance reported. **Clearly the ULF is a driver of employer engagement with unions around the learning agenda.**

Organisational resourcing

Table 5 details respondents' views on the employer contribution made towards union learning activity, and compares the current survey findings with the same workplaces surveyed in 2010. The questions elicited a relatively low response. However, there is some evidence of an increased employer contribution in terms of management time and in terms of other in-kind contributions. In the recent survey, just under two thirds (64 per cent) of those that answered the questions reported a contribution through management time, while 86 per cent stated that the organisation made an in-kind contribution. There were no sector associations and no associations with current ULF activity. In contrast, less than half (45 per cent) reported that the employer made a cash contribution towards union learning activity; a finding that was pretty identical to the response in 2010. *Private sector respondents and those that reported 'valuing the ULF' were more likely to be associated with making a cash contribution.*

Where respondents made an in-kind contribution they were asked to specify particular aspects of this contribution. The findings are detailed in Table 6. Respondents did not answer this question strictly in term of 'other in-kind' and answered also if they ticked 'cash' or 'management time' in Table 5. The key finding is that the level of employer contribution has held up very well between 2010 and 2013. The most significant employer contribution is towards ULR time, reported by nearly nine out of ten (89 per cent) of respondents. The fewest responses were for management time (58 per cent) and the support for learning centres (61 per cent), though the support for this may have increased between 2010 and 2013; a finding somewhat at odd with the finding above about involvement with unions on learning. The only association with sector also relates to support for learning centres, which is reported to be higher in the private sector than the public sector.

Table 5: *Employer contribution towards union learning activities (per cent)*

	2013	2010 panel	Count
Cash contribution	45	46	62
Management time	64	55	89
Other in-kind	86	78	119

Table 6: *Factors covered by an in-kind contribution (per cent)*

	2013	2010 Panel	Count
Equipment (e.g. phones, computers)	76	75	107
Office space	74	77	104
Learning centre	61	55	86
ULR time	89	83	125
Management time	58	63	82
Employee time	84	78	118

Where respondents indicated that they made a financial contribution towards union learning activity, the survey sought to explore exactly how much this was. Few respondents were willing to answer with a precise figure and the response to the question was therefore very low. The researchers experienced the same findings in the earlier survey. Where employers responded the cash contribution ranged from as low as £200 to a high of £1 million, though figures of over £100k were rare, reported by just four respondents. There is no way to verify the quoted figures. Likewise, few respondents were able, or willing, to quantify 'management time' or any 'in kind contribution' in financial terms.

Workplace and Organisation Outcomes

The analysis examined the potential impact of union learning on organisational outcomes at three levels: employee demand for learning; organisational learning practices; and, more general performance and organisational outcomes. Table 7 details respondents' perspectives on whether union learning activity has increased the demand for learning amongst different categories of employees. The findings show that respondents at the same workplace are less likely to report that union learning has increased employee demand for learning in 2013 compared to 2010. Nevertheless, nearly two thirds of respondents still state that union learning has increased employee demand for learning amongst those with little history of taking part in learning/ Training (64 per cent) and with poor basic skills (24 per cent). Far fewer reported increased demand amongst those with high skills. Just under a quarter (24 per cent) reported increased demand for those with high skills.

Again, no sectoral effects were observable. However, individual cross tabulations with the extent to which the ULF and ULRs were valued and the presence of learning committees, agreements and centres all has various positive associations. Table 7 details in brackets the responses for those employers that currently have a ULF project running. This reports much higher levels of increased employee demand.

Table 7: *The extent to which union learning has increased employee demand for learning (per cent)*

	2013	2010 panel	Count
Those with little history of taking part in learning/ training	64 (90)	73	161
Those with poor basic skills	65 (92)	74	160
With high skills	24 (42)	29	160

*Figures in brackets refer to where there is a current ULF project; * = significance at >0.05.*

The impact of union learning on organisational learning practices is reported in table 8. **The impact of union learning remains high, indeed in some aspects it seems to have increased.** The one notable area where its influence seems to have declined is in relation to employer expenditure of training and also the take-up of job related training. However, employers reported more favourable responses for the take up of non-job related training (49 per cent), continuing professional development, addressing basic skills gaps (60 per cent), the number of apprenticeship (22 per cent) and equality of access to learning and training opportunities (63 per cent). The findings were explored using contingency tables to ascertain whether there were any notable private and public sector differences. The only statistically significant finding related to employer expenditure on training, which was more likely to have increased in the private sector compared to the public sector.

Table 8: *Impact of union learning on organisational learning practices (per cent)*

	Increased	Stayed the same	Decreased
Take-up of job related training	34 (44)	67 (56)	0 (1)
Take-up of non-job related training	49 (38)	48 (59)	3 (4)
Number of employees attaining qualifications	53 (57)	46 (42)	1 (1)
Continuing professional development	38 (31)	59 (69)	3 (1)
Positively addresses basic skills gaps	60 (49)	40 (33)	1 (18)
Number of apprenticeships	22 (15)	76 (83)	3 (2)
Equality of access to learning/ training opportunities	63 (59)	37 (40)	1 (1)
Employer expenditure on employee training/ learning	17 (33)	78 (62)	5 (5)

The figure in () is the finding from the 2009/ 10 survey of the sub sample of 2013 workplaces.

The potential impact of a range of other factors were explored in a descriptive sense using cross tabulation, including whether the organisation had a learning centre, a learning committee, a learning agreement, a current ULF project and whether they valued the ULF and valued ULRs. **Across each variable most had a positive association.** This was less common for the number of apprenticeships, where only valuing ULRs was positively associated and employer expenditure on training and learning, where the presence of a learning centre and valuing ULRs and the ULF were associated. However, these variables were not included together in a multivariate analysis – which we consider below.

Table 9 reports the wider impact of union learning on organisational performance, with the figures in brackets the comparator statistics from the earlier surveyed workplaces. While in some areas the reported impact had declined this is not by a large amount, while the impact on staff morale and improvements in staff turnover appeared to have increased significantly and to a lesser extent in terms of levels of trust. A third of workplaces also report that union learning has contributed to improvements in the quality of work. The only public versus private sector effect related to staff turnover, with public sector respondents more likely to report that improvements in staff turnover had increased compared to their private sector counterparts. The findings were again cross-tabulated with the additional variables and suggested a wide and variable range of impacts.

Table 9: *The impact of union learning on organisational level indicators (per cent)*

	Increased	Stayed the same	Decreased
Organisation efficiency	26 (36)	74 (63)	1 (1)
Service/ quality indicators	30 (33)	69 (67)	1 (1)
Health and safety	34 (38)	65 (62)	1 (1)
Improvements in staff turnover	12 (6)	81 (91)	8 (3)
Staff morale	54 (43)	40 (54)	6 (3)
Employee commitment	36 (43)	60 (56)	4 (1)
Levels of trust between management and unions	47 (41)	49 (54)	4 (5)
Improvements in the quality of work	34	66	1

The figure in () is the finding from the 2009/ 10 survey of the sub sample of 2013 workplaces.

When individual outcomes variables are cross-tabulated with a range of other union factors, such as learning committees and agreements and the like, clearly statistical associations are evident. However, it is appropriate to construct models of a number of factors to control for various effects. The above findings were thus all modelled using logistic regression as follows:

Dependent variables – we all recoded as binary; hence, increased = 1 and stayed the same and decreased = 0.

Independent variables and controls included:

- Current ULF project (1 = yes; 0 = no)
- ULRs recognised (1, 0)
- Value ULRs (1 – strong agree/ agree; 0 = neutral, disagree, strongly disagree)
- Value ULF (as above)
- Learning committee (1, 0)
- Learning centre (1, 0)
- Learning agreement (1, 0)
- Training plan (1, 0)
- Training budget (1, 0)
- IiP (1, 0)
- Appraisal policy (1, 0)
- Negotiate on training (1 = negotiate; 0 = other)
- Number of employees (categorical codes 1-49, 50-99, 100-249, 250-499, 500 – 999, 1000+)
- Sector (Public, private, voluntary/ other)

Logistic regressions were run for each dependent variable in turn. The following table reports those variables with statistically significant and positive findings, with the odds ratio only reported.

Increased demand for basic skills	Learning committee – x 3.87 Value ULRs – 3.89
Increased demand for high skills	Union learning centre x 3
Increased impact on job related training	Value ULF – x6.5
Qualifications	Negotiation on training x 7.9 Value ULRs x 3.18
CPD	Learning centre x 4.4
Skills gaps	Negotiation x 3.37 Value ULRs x 2.85
Equalities	Learning committee x 3.19 Negotiate on training x 4.58
Expenditure	IiP x 4.76 Training plan - negative
Efficiency	ULF value – 3.84 Appraisal - negative
Staff turnover improved	Negotiate on training x 4.5 Learning centre x 4.8
Staff morale	Learning committee 2.54
Trust	Value ULRs x 3.1
Work quality	Value ULF 3.48

The findings show a variety of effects. However, it is clear that where employers value the ULF or ULRs, or have learning centres and learning committees and negotiate on training this can make a difference. To pick out just one example to illustrate:

Where respondents agree that they value the ULF, they are nearly 3.5 times more likely to say that union learning has led to an improvement in work quality – on the basis that all other variables are considered.

Sustaining union learning at the workplace

Table 10 explores some questions around sustainability. While there is some evidence of declining commitment to continuation with union learning activities amongst respondents, this does not seem to be a result that is dependent on the ULF. Indeed, a majority of workplaces now report that union learning will continue even without funding.

Only two findings have sector effects. Private sectors are more likely to disagree that they will continue to be involved in union learning activities and are more likely to agree that it will not continue even though it has been successful.

Table 10: *Sustainability and added value of union learning (per cent)*

	Agree	Neither agree/ disagree	Disagree
Organisation will continue to be involved with union learning activities	78 (89)	13 (8)	8 (4)
Union learning successful, but will not continue	9 (3)	11 (16)	81 (81)
Union learning of benefit to the organisation	29 (18)	18 (13)	53 (70)
Union learning benefited individuals taking part	82 (82)	15 (15)	4 (4)
Learning activities will take place, even without external funding	54 (48)	25 (22)	21 (31)
Management very supportive of the union role in learning	77 (81)	20 (14)	4 (5)
Unions should continue to develop their role in the learning agenda	92 (92)	6 (6)	2 (2)

Cost benefit analysis

The current survey asked a series of new questions on the cost-benefit of union learning. Few respondents were able to answer this question. Indeed, only around one in ten workplaces (11 per cent) reported that they did undertake any form of cost-benefit analysis. There was no sectoral effect, though in terms of percentage of respondents, just an analysis was more likely in the public sector. A series of questions sought to explore possible levels of additionality. However, the answers to this were given by quite small numbers and a degree of data cleaning is required to examine this issue further.

There was nonetheless a large proportion of respondents that felt that their organisation does get a return on the investment in union learning activity. Around three quarters reported that this was the case (74 per cent). Public sector workplaces were statistically more likely to report favourably (81 per cent). However, a majority of private sector workplaces (62 per cent) still reported a return on investment. This issue will be explored further, but initial content analysis suggest that the return is seen in terms of core union activity around the basic skills agenda and the softer ROI measures around staff morale.

Employer body interviews

The summary of findings below is based on 16 in-depth qualitative interviews undertaken in Spring 2013 with representatives of employer-led bodies (EEF, CIPD, BPIF, BITC and UKCES) and sector skills councils (Skills for Health, Assetskills, Cogent, Constructionskills, EUSkills, Creative Skillset, Skills for Justice, LANTRA and SEMTA).

The role of unions and Unionlearn in the UK learning and skills system

There has been considerable union involvement in government funded initiatives overseen by the UK Commission on Employment and Skills, including Employer Ownership of Skills, Growth and Innovation Fund and Employer Investment Fund projects. Unions have been strongly involved in UKCES, with unions including Unite, Prospect, CWU, USDAW, BECTU and NUJ, as well as Unionlearn, involved in the development of bids to these funding streams. The role of unions within particular employers, and particularly ULRs and union learning project workers, was seen as highly valuable as a means of raising awareness of and demand for skills and the various means of funding this development.

Apprenticeships were a key area where the role of unions was valued by interviewees from the employer organisations surveyed. Unions had played a key role in arguing for high quality apprenticeships with higher levels of training and development, longer duration and better employment conditions for apprenticeships. These aspirations for how apprenticeships should be structured were largely shared by employer organisations, notably in key sectors including engineering, energy, healthcare and high skilled manufacturing industries.

Unions had played a significant role within the healthcare sector around apprenticeships and addressing the skills requirements for new intermediate roles in the sector such as assistant practitioners (skilled healthcare roles at grades below established professions such as nursing, radiography, midwifery, pharmacy and similar). The Social Partnership Forum in the NHS brings together the key professional associations, Royal Colleges and unions and is viewed by interviewees from employer-led sectoral level bodies as a valuable means of discussing skills, apprenticeships and professional development and their implications for the sector. Unionlearn is represented in the NHS Social Partnership Forum (SPF) Campaign to Increase Workplace Learning programme Board. The Board is in charge of the preparation and delivery of the campaign and reports regularly to the Wider Group.

In the creative industries, the relevant sector skills council Creative Skillset was strongly engaged with the relevant unions in the sector. The training levy established in the film industry was a strong example of where social partnership principles, and the involvement of unions, was central to analysing where skills shortages existed, what should be the priorities for future investment and how these issues could be addressed in practice.

Unions were highly valued for their role in encouraging employing organisations to think seriously about longer term strategic investment in skills – it was noted that individual employers often focused on relatively short term priorities and

the role of unions in identifying skills shortages, areas where young workers needed to be brought into address problems associated with an aging workforce, and the skills profiles that would underpin any workforce expansion, was highly valued.

Sectoral level work involving home improvement retail and energy company customer service functions had taken place involving the relevant sector skills council (Assetskills) and Unionlearn to develop training, qualifications and recognised standards to underpin consumer advice on energy conservation.

The impact of Unionlearn and affiliated unions on promoting literacy and numeracy skills is well established, and the wider role that unions play in supporting basic skills development and promoting learning was viewed as contributing to the corporate social responsibility priorities of business.

Unions were valued for their role in supporting processes of organisational change – in the print sector, which faces major challenges with regard to the changing nature of media and technology, the role of unions in promoting the sector and apprenticeships within it to younger workers was viewed by interviewees from the relevant employers association as a valuable one.

Well established forms of joint working in the construction industry around accreditation (notably the Construction Skills Certification Scheme) and health and safety issues were highlighted as a valuable area of joint union-employer work around skills at the sectoral level.

Joint work between the main sector skills council in the energy sector (EU Skills), employers and unions was highlighted – this involved close working with unions to identify occupations within the sector that had an ageing workforce and skills shortages, and devising training strategies to address these issues. The sector had become increasingly reliant on migrant workers with particular skills to fill occupations where there were skills shortages (such as overhead line technicians), and sectoral engagement was a means of addressing this.

The contribution of unions and their industry-wide expertise was highlighted by a number of employer organisations as particularly valuable – union presence across an industry meant that they would often have higher levels of expertise and a broader outlook on the sector than would be held by representatives of individual employers.

Unions had played an important role within the manufacturing sector – Unionlearn and key unions in the sector had been engaged, since early 2009, with the key sector skills councils in manufacturing in the Manufacturing Skills Alliance, a sectoral body that supported employers in retraining their workforces during the recession and ensuring that workforces and their human capital could be preserved and enhanced in a period of suppressed demand.

Cogent, the sector skills council for the chemicals, nuclear, oil and gas, petroleum and polymers industries had been strongly engaged with unions on a number of initiatives. This included ULRs from key unions in the sector, most notably Unite and Prospect, promoting skills development and apprenticeships in a sector which faced skills shortages and an ageing workforce profile.

Joint working around health and safety issues was also a significant area – the ACAS agreement between Unite and major haulage companies in 2012 involved a joint commitment to improving health and safety training in the industry to create standardised accreditation for tanker drivers in petroleum distribution. Cogent was working with Unionlearn, employers and individual unions to develop this “gold standard” accreditation, which was viewed by interviewees as an important development in terms of regulating and improving the sector as well as addressing some of the sources of conflict that had arisen in recent years.

There are some issues identified that need consideration:

- Union presence in some sectors is weak. Similarly, engagement in the learning agenda is stronger in some sectors than others (e.g. LANTRA – SME profile of the sector makes the ULR workplace model less effective than in other sectors)
- The degree of active participation on SSC boards is stronger for some than others
- Awareness of ULRs and the detail of union activity and outcomes are still quite low amongst some employers and employer bodies.

Overall, interviewees from employer organisations valued the role of individual unions, their engagement with employers at sectoral levels, and the positive role of Unionlearn in supporting and facilitating this work, viewing such engagement as a platform for more strategic approaches to skills development than might be possible in a more fragmented context.

Observations and future directions

The feedback from employer organisations indicates the value and some of the issues faced in working with unions on the learning agenda. This raises the question of how to:

- Raise awareness of the nature and value of union engagement at a national and sectoral level and the specific value added from a union/employee perspective
- Build recognition that this value lies not just in facilitating skills plans in the workplace (important though that is) but also in challenging poor practice, championing quality and equality of learning opportunity and sharing good practice across sectors and promote engagement not only with ‘good’ employers but challenging ‘poor’ employers to think more strategically about workforce development.
- formalise engagement through strengthening national, sectoral or workplace ‘industrial partnership’ mechanisms that enhance dialogue and scope for negotiation i.e. UKCES, SSC-union skills action plans and workplace learning agreements
- strengthen union engagement in related initiatives that seek to enhance workplace HR/HRD practices such as Engage for Success and Mind Your Own Business (see UKCES).

Analysis of union learner data

Introduction

This analysis of learner data seeks to report on the outcomes from learning supported by trade unions, notably to profile learners and their learning progression. Secondary analysis was also conducted of ULF Management Information relating to learning activity and individual learner records relating to union learners participating in ESF funded learning programmes derived from the national Individual Learner Record (ILR) system administered by the SFA/National Data service.

Method

Data on individual learners in terms of demographics and learning outcomes were explored through analysis of learner data relating to union learners participating in European Social Fund funded programmes. This provides data on individual learners participating in multiple learning episodes. Data specifications were agreed with unionlearn and drawn from the Skills Funding Agency ILR database. Data are reported for the years 2006/7 to 2011/12 and the analysis explores demographics, learning activity and learner progression. In the analysis that follows we draw from this dataset to provide, initially, descriptive analysis against key demographic characteristics and in terms of learner outcomes and progressions, and, secondly, we provide econometric modelling that interrogates the relationships between learner type, learning activity and progression. Table 1 summarises the number of ESF records analysed.

Table 1: unionlearn learner data: ESF funded programmes 2007/08-2010/11

Learning episodes	21,312
Individuals	9,609
Average number of learning episodes	2.22

The strength of this dataset is the large number of learning episodes and learners captured. In total, the combined ESF sources included 9,609 learners and 21,312 learning episodes. The data allow for an analysis of the progression made by learners from their *starting point* (level of qualification on entry into union learning supported by ESF, the first type of learning) and their *end point* (learning level and learning types). Variables have been created that indicate the highest level of learning, range of learning types (such as formal, informal, vocational etc) and progression between learning levels.

While accepting that these data relate to a sub-set of all union learning activity, the ESF learner records provide the **only comprehensive³ set of individual learner records** relating to union learners that has remained consistent over time and spans the range of learning types that reflects the range of activity funded by the ULF.

³³ Other data sets have been interrogated, namely, UFI/UNET learner centre data and datasets of learners held by individual unions. It is not possible to track other learners that are funded by the SFA as there is no other method of 'tagging' learners on the ILR system as having been engaged via the union route other than those with a discrete ESF funded project code.

ESF learners are engaged by predominantly workplace-based learning projects. Unionlearn, and the union teams that run ESF projects, input data into Skills Funding Agency ILR national data collection systems. Data input is subject to verification checks and external third party audit. Data quality is generally good and quality has improved over the years, but levels of missing data prevent certain types of analysis, for example examination of the associations between learning, skills uplift and wages (where occupational data can be used to check assumptions of wage-uplift). The ESF learner data set only captures those learners supported by programmes funded by this route. It does not capture learners engaged by these programmes that then progress to other forms of learning such as other further or higher education programmes, self or employer funded learning.

The descriptive data presented here is unweighted. The regression analysis data has been weighted to adjust the ESF sample so that it better represents a known population profile. This is taken from a secondary source: the ULF database data of all union learners. The demographic profile of learners from both datasets is shown as Annex A. This is an important form of corroboration, and allows us to examine different econometric models that use different weights to ensure consistency with the **known profile** of unions learners. By running different models, with different weights, we are able to stress test our models to ensure that any finding reported is indeed accurate and consistent.

This section reports on learners, learning activity and progression in learning including a multivariate analysis exploring outcomes achieved by different categories of learners and the likelihood of progression for certain demographic groups and types of learning.

Findings

The profile of union learners

The demographic data for ESF learners in terms of gender, age, ethnicity and disability is shown in Table 2. The National Adult Survey (NALS) data for 2008 is also presented to provide a national benchmark. The (mean) proportion of men and women participating in ESF programmes was similar to the NALS average where 54.7 per cent of learners were female. Just over four in ten ESF learners were aged 45 or more and those aged under 25 made up a total of 8 per cent of ESF learners. There is a greater proportion of union learners in the 35-54 age groups compared to NALS. ESF data on ethnicity show that 11 per cent of ESF learners were from minority ethnic groups other than white British. Eight per cent of ESF learners reported that they had some form of learning or physical disability with the most prevalent learning disability was dyslexia. Disability data were not available from NALS.

Table 2: *unionlearn ESF learner data: demographic profile*

		ESF MI Records 2007-2011 (n 9,609)	National Adult Learner Survey⁴ 2008 (n 1,064)
Gender	Female	52.7	54.7
	Male	47.3	45.3
Age	Under25	8.0	29.6
	25-34	18.4	18.4
	35-44	29.2	19.0
	45-54	31.5	14.5
	55-64	12.1	10.1
	65+	0.8	8.4
Ethnicity	White British	88.7	82.3
	Other Ethnic group	11.3	17.7
Disability	Yes	8.0	.

Prior qualification levels

Table 2 shows the prior levels of qualification of ESF union learners. Amongst the ESF union learners, the proportion with a prior level below Level 2 (NQF) was 47.9 per cent. The proportion of union learners with qualifications below level 2 was significantly higher than the benchmark figure of 29 per cent taken from LFS UK workforce data. Just under a third (32.3 per cent) of ESF learners had prior levels of qualification at Level 3 or above, lower than the national average.

Table 2: Prior qualification levels of union learners (ESF)

	n 9,609	UK workforce (LFS 2008Q1)
No Qualifications	35.6	12.0
Below Level 2 ⁵	47.9	29.0
Level 2	19.8	20.0
Level 3+	32.3	51.0

Learning activity

Many ESF projects, notably in the North East region, offer learners access to formal (often Matrix accredited) information advice and guidance (IAG) sessions. Other initial engagement activity included IAG sessions and initial assessments of Skills for Life learning needs. ESF projects provided access to a wide range of learning. The offer varied at the workplace level and included learning from entry level to Level 5, depending upon needs identified and the range of provision that ULRs could access with support from the employer and FE and HE providers.

⁴ NIACE Adult Learner Survey – 2008, NIACE Leicester.

⁵ 'No qualification' is a sub-set of this category

Type of learning

A total of 406 different course titles were recorded on the ESF database 2007/8-2010/11 indicating the wide range of learning accessed by union learners. Table 3 shows the twenty five most popular courses. This illustrates the range of learning opportunities accessed across vocational learning at different levels, non-vocational, skills for life programmes and trade union education. Half of all learning episodes were learning information, advice and guidance (IAG) related sessions, with Adult Literacy and Numeracy forming the two most prevalent courses. The profile of learning activity is similar to the profile of learning activity reported across all ULF projects (via the ULF database).

Table 3: *unionlearn learner data ESF 2007/8-2010/11 learning level top 25 course titles*

Course title	ESF learning episodes %, n=21312	
	N	%
ESF Co financed - Participant receiving matrix accredited	8284	38.87%
Certificate in Adult Literacy	2039	9.57%
Certificate in Adult Numeracy	1151	5.40%
NVQ for IT Users (ITQ)	991	4.65%
Co-financed ESF provision not leading to a recognised	399	1.87%
TUC Union Learning Representatives - Level 2 (30 glh)	386	1.81%
NVQ in Customer Service	356	1.67%
TUC Union Learning Representatives - Level 3 (30 glh)	323	1.52%
TUC Pensions - Level 2 (9 glh)	300	1.41%
Basic IT	236	1.11%
NVQ in Business and Administration	229	1.07%
Spanish 2	190	0.89%
Introduction to British Sign Language	190	0.89%
Everyday Maths Skills - Common Measures (Level 1)	185	0.87%
NVQ in Supporting Teaching and Learning in Schools	180	0.84%
NVQ in Health and Social Care	170	0.80%
NVQ in Recycling Operations	165	0.77%
Certificate in ESOL Skills for Life (Entry 1)	164	0.77%
Everyday English Skills - Vocabulary, Spelling and	141	0.66%
NVQ in Waste Management Operations	139	0.65%
NVQ in Management	138	0.65%
TUC Union Representatives - Level 1 (12 glh)	123	0.58%
NVQ in Cleaning and Support Services	122	0.57%
Learning Centre Support Skills	121	0.57%

Table 4 and Table 5 show that, of the 21,312 ESF learning episodes reported, 38.9 per cent are IAG or initial assessment activity. Across the ESF projects, 90 per cent of learners have been engaged in at least one IAG session or undertaken an initial assessment. Just over three quarters (78 per cent) of all learning episodes were in accredited learning. Just over a fifth (22.0 per cent) of all learning episodes were categorised as 'other learning': that is, non-vocational or non-accredited provision, including learning tasters and continuing

professional development (CPD). A fifth (19.8 per cent) of all ESF learning was Skills for Life, 10.0 per cent NVQ Level 2 and 4.4 per cent ULR training. The remainder was NVQ learning at Level 1 and Level 3 or more. Column 3 of Table 4 shows the distribution of learning type when IAG episodes are excluded.

Table 4: *unionlearn learner data – ESF learners learning type.*

	ESF all learning episodes (inc IAG) %, n=21,312	ESF all learning episodes (not IAG) %, n=
IAG	38.9	-
Other Learning	22.0	35.9
Skills for Life	19.8	32.4
NVQ 2	10.0	16.4
ULRs	4.4	7.2
NVQ 3	3.0	4.9
NVQ 1	1.3	2.1
NVQ 4	0.2	0.3
NVQ 5	0.2	0.3
Higher Ed	0.2	0.3

Table 5 shows the level of the learning undertaken (in NVQ equivalence terms). Column 2 shows that, after IAG, Level 2 learning accounted for a quarter (24.7 per cent) of all learning episodes and Level 1 accounted for just 4.7 per cent of episodes. Column 3 takes IAG out of the analysis to provide data that relate to learning programmes only. This analysis indicates that Level 2 learning made up 40 per cent of all learning, just over a third at Level 1; less than 10 per cent was non-accredited and 12 per cent was learning at Level 3 or higher.

Table 5: *unionlearn learner data – ESF learning level (NVQ equivalence)*

	ESF all learning episodes inc IAG %, n=21,312	ESF all learning episodes NOT IAG %, n=9609
IAG	34.1	-
No level equivalent	4.7	7.8
Level 1 or Entry Level	23.7	38.8
Level 2	24.7	40.6
Level 3+	7.8	12.8

Learning Progression

Learner progression is defined here in terms of multiple learning activities and increased qualification levels or 'skills uplift'. Table 6 shows data on the proportion of ESF learners participating in one or more episodes of learning. Approximately nine out of ten learners (88.1 per cent) had undertaken more than one learning episode. In 2006, the figure reported was 80 per cent of ULF learners. Amongst the 2008-2010 ESF learners the maximum number of learning episodes by an individual was 11 and the median was 2.1, including IAG activity. Fourteen per cent of learners had taken three or more ESF courses.

The incidence of multiple learning provides an illustration that union learners were often repeatedly engaged in learning through the union learning route. But to what extent does repeat learning represent any notion of 'progression'?

Table 6: *unionlearn learner data: ESF multiple learning episodes*

	ESF all learners (inc IAG) n= 9,609
1 episode	25.6%
2 episodes	44.9%
3 episodes	18.3%
4 episodes	7.1%
5 or more episodes	4.1%

Participation in different types of learning

An indicator of learning progression was explored in terms of the extent to which individuals participated in more than one category or type of learning. For the purposes of this analysis learning was categorised into IAG, Skills for Life, NVQ1, NVQ2, NVQ3, NVQ4 and NVQ5, ULR training and 'other (non-accredited) learning'. The extent to which individuals were involved in more than one type of learning is shown in Table 7. Three quarters learners took part in at least two types of learning: this included involvement in an IAG session and participation in at least one other type of learning programme.

Table 7: *unionlearn learner data: ESF participation in different types of learning*

	ESF all learners (inc IAG) n= 9,609
1 learning type	25.8%
2 learning types	64.8%
3 learning types	8.4%
4 learning types	1.0%

Highest level of learning

Learning activity recorded on the Skills Funding Agency/ESF database was coded using the standard national qualifications framework enabling a ranking of learning activity in terms of NVQ level or equivalence. This enabled the analysis to look at the highest level of learning union learners participate in. Table 8 shows that 52.3 per cent of learners' highest learning level was Level 2 or higher, with 13% learning at level 3 or higher, while for around half it was were learning at Level 1 or below, with a quarter of learners (23.8) participating in learning that was not accredited.

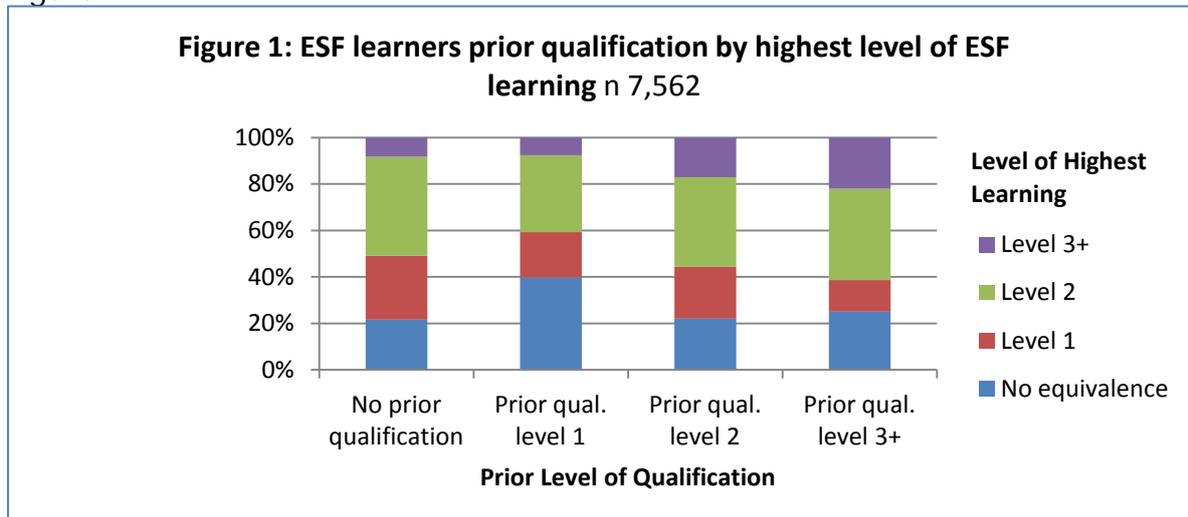
Table 8: unionlearn learner data – ESF learner’s highest learning level

	Highest learning level % n=9,609
No level equivalent	23.5
Level 1 or Entry Level	24.3
Level 2	39.4
Level 3+	12.9

Progression from previous qualification level – skills uplift

Skills uplift is calculated by looking at the level of prior qualification (before union learning) and the highest level of learning undertaken. The prior level of learning was not known for 10.1 per cent of ESF learners. Figure 1 shows data on progression for those where prior qualification was known. Overall, 38.8 per cent of learners progressed in terms of participating in learning that was at least one level higher than their prior level of qualification.

Figure 1



Almost three quarters of learners with a prior level of qualification below Level 2 had participated in ESF learning at least one level higher; 17.0 per cent of Level 2 learners made this type of progression. It is also of note that 77.9 per cent of those learners with prior levels of learning at Level 3 or more were taking courses at a level below Level 3 (mainly skills for life and IT courses). This reflects the extent to which union learning provided opportunities for learners to refresh or widen their learning as well as increase qualification level.

Distance travelled – learning levels

The ‘distance travelled’, or the extent to which learners’ progressed through learning levels, is shown in Table 9. Of the third (32.8 per cent) of learners that progressed, half did so by 1 level above their prior qualification, almost half increased their learning level by 2 levels and almost one in ten increased their learning level by 3 levels.

Table 9: *unionlearn learner data – learning progression distance travelled*

Change in level from prior to highest learning level	% of ESF learners <i>n=6,125</i>
5 levels	0.1
4 levels	0.2
3 levels	4.2
2 levels	22.1
1 levels	22.5
No change	15.8
-1 level	16.2
-2 level	11.0
-3 levels	6.4
-4 levels	1.5

Who achieves progression?

Table 10 explores the achievement of an increase in qualification level by ESF learners by different demographic groups. The two factors that appear associated with an increase in skills uplift was prior qualification level below Level 2 and attending multiple union learning courses. This result is intuitive in that union learning programmes (encouraged by targeted funding) aim to engage learners without prior qualification. The data indicate that union learning actually engaged learners from a broad range of backgrounds. However, participation and achievement (in terms of qualification gain) appears more likely to be achieved by those with lower prior levels of qualification.

Table 10: *unionlearn ESF data % of learners increasing learning level by category*

Category	ESF learners % of learners increasing learning level <i>n=7,562</i>
All	37.8
Female	39.0
Male	36.3
White British	37.0
Other ethnic group	37.7
Age group under 45	36.7
Age group 45+	38.8
Disability – yes	.
Disability – no	.
Prior qualification less than level 2	71.4
Prior qualification level 2 or higher	17.6
Attended multiple union learning episodes	56.7

The data have been explored further using multivariate analysis to develop models examining the association between progression outcomes and learner demographics and learning activity. To develop the regression model we have generated a variable **level of progression** (independent variable) with values 0=negative/ no change and 1 =positive. The rest of the demographic variables remain the same as reported in the descriptive analysis above:

- **Gender:** (male/female)
- **Age groups:** under 25, 25-34, 35-44, 45-54, 55-64, 65+
- **Ethnicity groups:** White British, Other ethnic group
- **Disability:** Yes/no
- **Learning difficulty:** Yes/no
- **Highest learning level:** No qualification, Level 1, 2,3,4,5 or more
- **Multilearning types:** One, two, three, four types or more
- **PriorQualLevel:** no/low –qualification (inc, entry level and below level 1), Level 1, Level 2 and Level 3 and above

We constructed two models. Both used logistic regression, with the co-variates introduced in a single entry block.

- **Regression model 1:** created variable **Union learning level achieved (binary)** as the dependent variable, with a value of 0.00=low level achievement (0, level1 and level 2) and a value of 1 = high level achievement (levels 3 and 4)
- **Regression model 2:** created a **progress** variable with values 0.00=No progress, 1.00= progress

Here we report the results for Models 1 and 3. The regression results were analysed for the ESF sample and again with a weighting for gender and prior learning to reflect the national population of union learners. The weighted results are presented for gender. The regression results are shown in Annex B.

In relation to level of learning, the results in Table B1 indicate that females are significantly more likely than men to participate in learning at a higher level than men. **Women are between 1.60 and 1.62 times (for unweighted and weighted data respectively) more likely than men to participate in union learning at a higher level.**

There is no effect for age or disability. White British are 1.56 and 1.52 times more likely to participate in learning at a higher level than non-white British. Participating in a greater number of learning types is (with four as the reference category) also significant in terms of achieving higher learning levels. With learners that had participated in 1, 2 or three learning types significantly less likely to have achieved a high level of learning than those with four types of learning. Interestingly, there is no significant difference in the likelihood of learning at a higher level in relation to prior levels of qualification, suggesting that those with lower levels of prior learning are no less likely to progress to learning at the higher levels as others in the sample. However, where learners have evidence of progression they are more likely to have achieved high levels of union learning.

Indeed, across all variables in the model, progression appears to be the strongest predictor of achieving a high level of union learning.

In Table B2, the dependent variable is any progression (from prior learning level). The dependent variable is set to explore the predictors of positive progress. In this case, female learners are less likely to predict progression than men. There is no age effect, while white British are less likely to progress than non-white British. There is an association between higher level of union learning achieved and progression, with those with high levels of union learning around 2.5 times more likely to progress than those with low levels of union learning.

The strongest predictor of progression, however, is the extent of multiple learning. Simply put, the more types of learning undertaken, the more likely than learners are to progress.

Annex A Profile of the sample of ESF union learners (SFA/ILR data) and all union learners (ULF datasets)

The ULF MI includes data on the performance targets set for the programme which report on volumes of learners, the types of learning and qualifications gained. The ULF database also records the demographic profile of participating learners in terms of age, gender, ethnicity, disability and prior learning level. The ULF database allows for basic trend analysis of learning outcomes. It does not allow for the analysis of individual learning records⁶.

	ULF National Database n 286,627	ESF Learners 2007-2011 N 9,609
	% total valid	% total valid
Male	61%	47% (weighted as 1.3)
Female	39%	53% (weighted as 0.74)
Aged 16 -24	11%	8.0%
Aged 25 -49	65%	74.4%
Aged 50+	23%	17.8%
African/Caribbean	3%	3%
African	2%	
Asian	6%	3%
Other black and minority ethnic	3%	2%
White ethnic group	84%	89%
Other ethnic group	3%	2%
English as first language	13%	Na
English not as first language	87%	Na
Disabled	8%	8%
Not disabled	92%	92%
No qualifications	18%	36%
Below NVQ 1 or equivalent	6%	2%
NVQ 1 or Equivalent	13%	7%
NVQ 2 or Equivalent	21%	19%
NVQ 3 or Equivalent	11%	15%
NVQ 4 or Equivalent	6%	11%
NVQ 5 or Equivalent	11%	5%
Other qualifications	14%	5%

⁶ Unionlearn has been developing and piloting a central union learning database which is broader in scope and captures both demographic and learning activity data, along with data on participating employers and providers in a relational database that includes individual learner records. However, this enhanced database has not been operational to an extent that facilitates analysis to-date.

Annex B: Learner outcomes regression models

Table B1: Regression Model 1

Dependent: Union learning level achieved

**Variables in the Equation: High level of union learning achievement
(unweighted)**

	B	S.E.	Wald	df	Sig.	Exp(B)
Age (reference category 65+)			39.027	5	.000	
Under 25	-.084	.384	.048	1	.826	.919
25-34	-.197	.375	.277	1	.599	.821
35-44	-.045	.370	.015	1	.903	.956
45-54	-.483	.370	1.699	1	.192	.617
55-64	-.751	.386	3.795	1	.051	.472
White British	.375	.162	5.388	1	.020	1.455
Prior qualification level (reference category levels 3, 4 and 5)			1.780	3	.619	
No or low level qualifications	.115	.087	1.750	1	.186	1.122
Step 1 ^a Level 1	.050	.149	.113	1	.737	1.051
Level 2	.075	.106	.494	1	.482	1.078
No disability	-.117	.150	.607	1	.436	.889
No learning difficulty	.851	.770	1.220	1	.269	2.342
Multi learning (reference category: four types)			108.691	3	.000	
One type	-2.595	.288	81.216	1	.000	.075
Two types	-1.732	.253	47.020	1	.000	.177
Three types	-1.217	.267	20.742	1	.000	.296
GenderL13_1(1)	.468	.080	34.504	1	.000	1.596
progression2	.920	.076	145.572	1	.000	2.509
Constant	-1.630	.889	3.363	1	.067	.196

a. Variable(s) entered on step 1: AgeGroup_1, EthnicGroup_1, NewPriorQualifLeve, disability_binary, learn_diff_bin, MultiLearningType, GenderL13_1, progression2.

Variables in the Equation: High levels of union learning (weighted)

	B	S.E.	Wald	df	Sig.	Exp(B)
Age (reference category 65+)			32.044	5	.000	
Under 25	.118	.419	.079	1	.778	1.125
25-34	.032	.409	.006	1	.938	1.032
35-44	.174	.404	.187	1	.666	1.191
45-54	-.251	.404	.385	1	.535	.778
55-64	-.474	.419	1.281	1	.258	.622
White British	.418	.169	6.124	1	.013	1.520
Prior qualification level (reference category levels 3, 4 and 5)			1.516	3	.679	
No or low level qualifications	.105	.090	1.359	1	.244	1.111
Level 1	.018	.154	.014	1	.905	1.019
Level 2	.082	.110	.556	1	.456	1.085
No disability	-.158	.155	1.039	1	.308	.854
No learning difficulty	.608	.694	.767	1	.381	1.837
Multi learning (reference category: four types)			106.41	3	.000	
One type	-2.520	.285	78.108	1	.000	.080
Two types	-1.766	.257	47.377	1	.000	.171
Three types	-1.237	.271	20.775	1	.000	.290
GenderL13_1(1)	.480	.079	37.194	1	.000	1.616
progression2	.944	.079	142.28	1	.000	2.569
Constant	-1.609	.837	3.695	1	.055	.200

a. Variable(s) entered on step 1: AgeGroup_1, EthnicGroup_1, NewPriorQualifLeve, disability_binary, learn_diff_bin, MultiLearningType, GenderL13_1, progression2.

Table B2: Regression model 3

Dependent variable = Progression

Variables in the Equation: Progression (unweighted)						
	B	S.E.	Wald	df	Sig.	Exp(B)
			38.073	5	.000	
Age (reference group: 65+)						
Under 25	-.059	.320	.034	1	.854	.943
25-34	-.435	.313	1.936	1	.164	.647
35-44	-.025	.309	.006	1	.936	.975
45-54	.035	.309	.013	1	.911	1.035
55-64	.063	.316	.040	1	.842	1.065
White British	-.259	.106	5.982	1	.014	.772
Prior level of qualification (reference: no or low qualified)			1.455	3	.693	
Level 1	.119	.107	1.234	1	.267	1.126
Level 2	.037	.076	.239	1	.625	1.038
Level 3,4 or 5	.002	.063	.001	1	.974	1.002
No disability	.161	.111	2.125	1	.145	1.175
No learning difficulty	.187	.424	.194	1	.659	1.206
MultiLearningType (reference: one type of learning)			265.307	3	.000	
Two learning types	1.358	.090	228.041	1	.000	3.887
Three learning types	1.655	.118	196.699	1	.000	5.235
Four learning types	2.065	.273	57.358	1	.000	7.885
Female	-.212	.057	13.973	1	.000	.809
High union learning level	.920	.076	145.840	1	.000	2.508
Constant	-1.768	.532	11.030	1	.001	.171

a. Variable(s) entered on step 1: AgeGroup_1, EthnicGroup_1, NewPriorQualifLeve, disability_binary, learn_diff_bin, MultiLearningType, GenderL13_1, Union_Learning_Level_achieved_binary.

Variables in the Equation: Progression (weighted)

		B	S.E.	Wald	df	Sig.	Exp(B)
Step 1 ^a	Age (reference group: 65+)			37.934	5	.000	
	Under 25	-.120	.324	.137	1	.711	.887
	25-34	-.440	.316	1.940	1	.164	.644
	35-44	-.020	.313	.004	1	.948	.980
	45-54	.028	.312	.008	1	.928	1.028
	55-64	.058	.319	.033	1	.856	1.059
	White British	-.241	.107	5.122	1	.024	.786
	Prior level of qualification (reference: no or low qualified)			1.873	3	.599	
	Level 1	.127	.107	1.398	1	.237	1.135
	Level 2	.006	.077	.007	1	.935	1.006
	Level 3,4 or 5	-.020	.064	.100	1	.752	.980
	No disability	.148	.113	1.722	1	.189	1.159
	No learning difficulty	.400	.421	.903	1	.342	1.492
	MultiLearningType (reference: one type of learning)			289.44	3	.000	
	Two learning types	1.327	.083	252.83	1	.000	3.768
	Three learning types	1.592	.114	196.75	1	.000	4.916
	Four learning types	2.015	.274	53.957	1	.000	7.500
	Female	-.209	.057	13.404	1	.000	.812
	High union learning level	.943	.079	142.56	1	.000	2.569
	Constant	-1.938	.531	13.303	1	.000	.144

a. Variable(s) entered on step 1: AgeGroup_1, EthnicGroup_1, NewPriorQualifLeve, disability_binary, learn_diff_bin, MultiLearningType, GenderL13_1, Union_Learning_Level_achieved_binary.