



Union Learning Survey

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The views expressed in this report are the authors' and do not necessarily represent those of Unionlearn, the TUC, the unions or ULF projects.

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INTRODUCTION

This report contains the findings of a large scale survey of people who took part in learning as a result of support provided through Round 15 of the Union Learning Fund (ULF).

The main focus of the report is an analysis of quantitative data gathered via the survey. This is supplemented by external benchmarking against the findings of the Community Learning Learner Survey (BIS, 2013) and the use of a model to generate an estimate of the economic impact and the return generated by public investment ULF Round 15.

To illuminate points arising in the analysis, comments made by survey respondents about their experience of union learning have also been included.

The objectives of the study are :

1. To review the characteristics of participants in union learning;
2. To review the outcomes of union learning and impact of participation on learners' lives;
3. To identify factors that appear to predict or to be positively correlated with positive outcomes of learning; and
4. To assess the impact and value added by the ULF.

EXECUTIVE SUMMARY

Background

Trades Unions have a long history of involvement in learning. In recent years union involvement in training has come to be seen as having a strategic significance and as offering a basis for a co-operative partnership between unions and employers. This resulted in the establishment of the Union Learning Fund (ULF) in 1998.

This report sets out the results of a survey of people who were supported into learning through the activities of projects supported by Round 15 of the ULF. In total, £14.15m was awarded to 41 projects, of which eleven participated in the survey. Although they made up just 27% of ULF Round 15 projects, the eleven that participated in the survey accounted for 50% of the funding and 59% of the opportunities generated through ULF Round 15.

Together, they delivered:

- 1,200 training opportunities for Union Learning Representatives
- 11,800 opportunities for people to improve their English, Maths & Functional skills
- 20,000 opportunities for people to gain ICT skills at a variety of levels
- 6,350 opportunities for people to gain vocational qualifications at Level 2 and Level 3
- 15,000 Continuing Professional Development Opportunities
- 18,000 opportunities for people to progress to Further Education
- 400 opportunities for people to progress into Higher Education
- 4,700 Apprenticeship opportunities.

They also referred 19,700 people into Informal Adult & Community Learning, provided advice via ULRs to 90,000 people and referred another 12,000 people to advice, guidance and support delivered by external organisations.

Compared to all ULF Round 15 projects, the projects taking part in the survey delivered a higher proportion of the following forms of learning than we would expect: training for ULRs (82%); functional skills (70%); FE (82%); Apprenticeships (73%); and information, advice and guidance provided via ULRs (75%).

The Union Learning Survey (ULS) was conducted through an online survey and a paper / postal questionnaire, both of which were cascaded to learners through their unions. A total of 2,519 responses were received. The number of responses from participating projects ranged from 66 from the CWU to 439 from USDAW. Random sampling was not possible and, as occurs with all postal and online surveys, individuals participated on a self-selecting basis.

Profile of courses

The most common types of learning undertaken by respondents were: short courses or events to gain skills and knowledge related to learners' work or professional development; training to be a Union Learning Representative; ICT courses; informal learning; functional skills; and vocational courses.

The majority (62%) of respondents had taken part in more than one episode of learning and 31% had taken part four times or more. Roughly half of respondents (48%) had participated in more than one type of learning. Three quarters (74%) had participated in union learning within the last 12 months.

Over half (56%) of respondents gained a qualification as a result of their learning, with equal numbers gaining a qualification at a level higher than their existing qualifications and gaining a qualification at the same or lower level. Five percent of all respondents gained a qualification, but were unsure of its level, relative to the qualifications they already held. Learners undertaking vocational courses (82%) and higher education or training (71%) were most likely and those taking part in informal learning for leisure, pleasure and personal development (12%) were least likely to have achieved a qualification as a result of union learning. The likelihood of attaining qualifications is heavily influenced by the number of courses undertaken by learners.

The most common principal motivation for respondents' participation in union learning was to perform better in their current job or to advance their career, gain promotion or a pay rise (37% of learners). Other common motivations were to support people in their community or workplace (24%) or to gain skills that would be useful in their everyday life (23%).

The proportion of respondents gaining qualifications was highest among learners motivated by a desire to advance their career, gain promotion or a pay rise (67%) and lowest among those learning for fun or to meet new people (23%).

Profile of learners

The majority (83%) of respondents were aged 25 to 64 years old, of peak working age. Compared to the general population, a slightly higher proportion of union learners were from minority communities or had English as a second language (ESOL). The gender balance was slightly biased towards women, while the proportion of learners with a disability was below that for the general population. The vast majority of union learners (88%) were employed with permanent contracts of employment. However a sizeable minority were agency workers, on fixed term or temporary contracts (16%) or were receiving income-related benefits (8%). While union learners were more likely than the general population to hold any qualification, they were less likely to hold qualifications at degree level or above. A sizeable minority held low level qualifications or qualifications from abroad.

Patterns of learning

Female learners were more likely than males to have undertaken short courses or to have undertaken learning for pleasure, leisure or personal development and less likely to have undertaken training in ICT or vocational courses leading to Level 2 or Level 3 qualifications. As a consequence, a higher proportion of women (46%) than men (29%) participated in learning that did not lead to a qualification.

Older learners were more likely to have participated in multiple episodes of union learning, to have participated in informal learning, ICT, and training to become a ULR and to be motivated by a desire to support people in their community / workplace or to do something fun and to meet new people. Younger respondents were more likely to be motivated to learn in order to advance their career, gain promotion or a pay rise and were more likely to have gained qualifications than older respondents.

While there are significant differences between minority communities, respondents who identified as White British were more likely to have participated in multiple episodes of union learning

Respondents from minority communities were more likely to have participated in ESOL and functional skills training and less likely to have participated in short courses / events, vocational training and training to be a ULR. Interestingly, people from minority communities, particularly from Asian or Asian British communities, frequently stated that their motivation for participating in union learning was to advance their career, gain promotion or a pay rise. The desire to perform better in their current job was also frequently cited as a motivation by White Other and Black or Black British respondents. White British respondents were more likely than others to be motivated to support people in their community or workplace, which is linked to training to become a ULR.

Respondents with ESOL were much more likely to have participated in ESOL and functional skills training and less likely to have participated in all other forms of learning. They were more likely to be motivated to learn by a desire to perform better in their current job, to advance their careers, gain promotion or a pay rise, or to gain skills that would be useful in everyday life, but participated in fewer episodes of union learning than average and were less likely to gain a qualification.

People with a disability were more likely to have participated in multiple episodes of learning, to have taken part in learning to become a ULR, to have attained qualifications and to cite wishing to support people in their community or workplace as their primary motivation.

Full-time employees were more likely to have participated in multiple episodes and nearly all forms of learning (apart from short courses and events) than part-time employees.

As well as being less likely to participate in learning, part-time employees were more likely to participate in short courses which are less frequently accredited. Economically inactive respondents were significantly less likely to gain qualifications than full-time employees and

more likely to be motivated by a desire to support people in their community or workplace or to do something fun or meet new people.

Conversely, union learning appears to have been highly effective in addressing the skills needs of workers on fixed-term or temporary contracts and those employed through an agency. Motivated by the desire to perform better in their job or to advance their career or gain a pay rise, this group was more likely to have participated in multiple episodes of learning, to have participated in ESOL and to have gained qualifications at a higher level than the qualifications they already held.

Those in receipt of benefits (including in-work benefits) were less likely to have engaged in multiple episodes of learning; more likely to have undertaken training in functional skills, ICT and ESOL and, unsurprisingly, more likely to cite a desire to advance their career, gain promotion or a pay rise.

Unsurprisingly, respondents with low levels of qualifications were likely to participate in learning focused on the acquisition of functional skills and ESOL, while respondents with higher levels of qualifications were more likely to have participated in higher education, short courses and events and training to become a ULR. Those with higher qualifications were much more likely to have engaged in multiple episodes of learning, a finding which suggests that union learning is taken up by enthusiastic learners and, over time, results in the attainment of higher level qualifications.

Skills gained

Overall, 92% of respondents identified at least one skill that had improved as a result of their involvement in union learning. The skills most commonly gained were: self-confidence/sense of what I can achieve (gained by 49% of respondents); vocational/practical/professional development (37%); and planning and organising skills (32%).

Learners who gained qualifications were more likely to report that they had developed skills than those who hadn't. Learners who gained qualifications at a higher level than those they already held identified gaining an average of 3.9 different skills as a result of their participation in union learning, compared to 1.7 skills for those who had not gained a qualification.

Skills such as ESOL, ICT, Literacy and Numeracy, which are often the focus of specific training programmes, are particularly likely to be gained by learners attaining qualifications. The impact on self-confidence and, interestingly, the acquisition of vocational/practical/professional skills is less influenced by accreditation, probably due to the vocational relevance of unaccredited short courses and events.

Learners who completed their courses attained an average of 1.9 skills each, compared to 1.2 for early leavers. Course completion was particularly important for developing self-confidence, vocational and practical and professional skills.

Unsurprisingly, the type of skills developed was closely linked to the type of learning undertaken. Some skills, such as self-confidence, were acquired by all learners, while types of learning focused on specific skillsets (such as ICT) produced more concentrated skills outcomes. An analysis of skills outcomes for respondents who participated in one type of learning shows that vocational courses were associated with the acquisition of a particularly wide variety of skills, while informal learning was least likely to be associated with skills acquisition.

Learners who participated in multiple episodes of learning acquired a much greater range of skills than single episode learners, a finding which supports maintaining a focus on fostering cultures of learning.

Application of skills to work

Nearly three quarters of respondents (74%) felt that union learning had given them new skills that they might use in their current job and two thirds (60%) felt they had gained new skills they could use to get a job or to change into a different type of work. Respondents who had taken part in union learning to advance their career or to gain promotion or a pay rise were most likely to report gaining new skills that they might use to get a new job or to change into a different type of work. The proportion of respondents gaining skills that they might use in their current job and / or to get a new job / change career increases steadily with the number of learning episodes they have engaged in. This, again, points to the value of supporting multiple learning episodes.

Functional skills, ICT, ESOL, vocational courses and higher education were seen as particularly likely to help respondents in their current work or to achieve career aspirations.

Outcomes gained

Hard Outcomes

On the basis of a “yes” / “no” response, the most common hard outcome, i.e. occurrence that “actually happened” as a result of participation in union learning, was that participants were able to do their existing job better, cited by 40% of respondents. Large numbers of learners were also more confident about progressing in their career (35%), more involved in their union (32%), more confident about funding a job in future (24%) or became a ULR (19%).

The existence of significant gaps between a) the proportion of respondents who felt they were performing better at work and the proportion who gained a pay rise and b) the proportion who felt they had gained skills that would help them gain promotion / change job and those who had actually attained these outcomes, suggests that a significant proportion of the benefit of union learning accrues to employers, at least in the short-term.

Unsurprisingly, respondents’ motivations for taking part in learning influenced the outcomes they experienced. For example, those most motivated to support people in their workplace or community were most likely to have become more involved in their union or had become a

ULR. Interestingly, however, feeling able to do their job better and more confident about progressing in their career were reported outcomes for large numbers of respondents, regardless of their motivation for learning.

The type of learning undertaken had a significant impact on the attainment of hard outcomes. Respondents who had participated in vocational courses were more likely than others to report outcomes relating to employment progression, i.e. that they had gained promotion or greater responsibility in their job; that they felt more confident about progressing in their career; and more confident about finding a job in the future. Those who trained to become a ULR reported being much more involved in their union. Participants in HE reported a wide range of outcomes, while those who participated in informal learning were less likely to report they had attained any of the specified outcomes than others. Caution is required, as this may be a function of the duration these different forms of learning. However, interestingly and impressively, respondents who participated in ESOL were significantly more likely than average to report a wide range of outcomes, including that they got a new job or changed to a different kind of work; were able to do their job better; stayed in a job they might otherwise have lost; felt more confident about progressing in their career; and felt more confident about finding a job in the future.

Learners who engaged in multiple episodes and types of learning attributed a much larger number of hard outcomes to their learning than single episode learners. Multiple participation was particularly closely linked to gaining a new job, promotion, a pay rise, becoming a ULR and becoming more involved in the union. Once again, this appears to support a policy of encouraging people to engage in multiple episodes of learning.

Soft outcomes

On the basis of a scale, from “completely agree” to “completely disagree”, more than two thirds of respondents agreed that union learning resulted in them: becoming more confident in their abilities (82%); more likely to undertake further learning and training (79%); more enthusiastic about learning (74%); and better able to organise, mentor and support other people (66%). Over half of all learners agree or completely agree that union learning has improved their quality of life and well-being (51%) and has resulted in them getting a better idea about what they want to do in their life (53%).

Again, outcomes were influenced by the type of learning undertaken. Functional Skills learners were more likely than average to agree that they were more enthusiastic about learning; had improved their quality of life / well-being; and had become a more capable parent. Those on vocational courses were more likely to agree that they had a better idea about what they wanted to do with their lives and were most likely to agree that they had become more confident in their abilities, while those training to become a ULR were more likely to agree that they were better able to organise, mentor and support other people.

The proportion of ICT training, informal learning and short course participants who experienced these outcomes was lower than average, for every outcome, which may be a function of the duration and depth of these types of learning. However, set against this, it is impressive that ESOL learners were more likely than average to have experienced every

single outcome and were most likely to agree that they had become more enthusiastic about learning; had a better idea about what they wanted to do in their lives; improved their quality of life; were more likely to undertake further learning and training; had become a more capable parent; felt more confident about progressing in their career; and were more confident about finding a job in the future.

The importance of union support

Nearly three out of four (72%) of respondents felt that their union was either extremely important (39%) or very important (33%) in supporting their learning. Only 13% thought it was only slightly (6%) or was not at all (7%) important. It is interesting to note that respondents in many minority or disadvantaged groups attributed a higher level of importance to the support received from their union than others.

Benchmarking outcomes

To help us to consider the extent to which these outcomes are 'good', we benchmarked the findings of this Union Learning Survey (ULS) against those for the Community Learning Learner Survey (CLLS).

Perhaps reassuringly, this exercise shows that very similar proportions of respondents to each survey agreed that they: had become more enthusiastic about learning; had a better idea about what they wanted to do in their lives; were more confident in their abilities; and were more likely to undertake further learning and training.

A higher proportion of CLLS respondents (71%) than ULS respondents (51%) agreed that learning had improved their quality of life. This is not unexpected, given that community learning includes much of learning for leisure, pleasure, cultural enrichment and intellectual or creative stimulation. When we look at employment-related outcomes, the opposite pattern emerges. A higher proportion of ULS respondents (42%) than employed CLLS respondents (33%) felt able to do their job; had gained promotion, greater responsibility or got a pay rise (11% v 6%); or stated that their learning had given them new skills that they might use in their job (82% v 61%). Less expected is that a higher proportion of CLLS than ULS respondents stated that they were more confident in progressing in their career (42% v 36%) or stayed in a job that they might have lost (5% v 3%) as a result of their learning. It is not clear why this should be the case.

The impact of learning

Investing in skills and learning has benefits for:

- **Society** through a healthier population, greater civic participation and less crime;
- **Individuals** by raising their likelihood of being in employment, improved wages, economic resilience and life-satisfaction;
- **Employers** who gain a more productive and innovative workforce; and

- **The economy** by increasing productivity and employment rates (Campbell et al, 2010).

These impacts are inter-related. Raising skill levels raises salaries and employment levels, which reduces poverty, which in turn reduces illness, disease and unhealthy behaviours. The complexity and diversity of these relationships is such that building a model of the overall impact of any single investment in skills is impossible. Nevertheless, it is possible to combine the survey results with previous research to reach a rough estimate of the economic impact of Round 15 of the ULF.

Economic impact estimates

Based on estimates of the increased earnings that individuals experience a) from higher wages and b) from the greater likelihood of being employed as a result of gaining qualifications, we estimate that the overall impact of investment in ULF Round 15 extension is around £916million. The total benefits to individuals are estimated to be £580 million, made up of £470 million from higher wages and £110 million as a result of being more likely to be in employment. The net benefit to employers resulting from the greater productivity of a better skilled workforce (less output lost as a result of working time taken to engage in learning) is estimated at £336 million.

Taking into account the cost of delivering learning (by FE colleges and others) brokered via Union learning, we estimate that each £1 invested in the ULF generates a total economic return of £9.15, of which £5.75 accrues to individuals and £3.40 to employers.

Our estimate of return on investment varies significantly by the type of learning provided, with Apprenticeships, accredited FE and vocational programmes showing the highest level of net return on investment. The return on ICT and English, Maths and functional skills are also substantial, while the net return on higher education and informal learning are calculated to be negative. This is due to the fact that most informal learning is unaccredited (and therefore being assumed not to confer a benefit) and because the collective cost of tuition fees, earnings and productivity foregone is higher than the significant (c. 11%) uplift in annual earnings that results from higher education, particularly for older learners who have less time left in the labour market during which the benefits will be felt.

A limited model, focused on tax receipts, suggests that the fiscal return to the Exchequer from learning generated by ULF Round 15 amounts to £250m or, taking delivery costs into account, generates an estimated return of £2.50 for each £1 of public funding invested in ULF Round 15.

BACKGROUND

Unions and learning

Trades Unions have a long history of involvement in learning. Although often associated with a focus on pay and jobs, unions have always been concerned to equip their members with the education and skills they need to progress in work; to contribute to the betterment of their workplace and society; and to become active, self-fulfilled citizens. According to John Fisher, if one includes the work of the Workers Education Association (WEA) and Labour colleges, Trade Union Education has been *“the most important mass adult education programme carried out specifically for working class people during last century”* (Fisher, 2005).

While members’ personal development has been a longstanding concern for unions, in recent years their involvement in training and learning has come to be seen as having a strategic significance and as offering a basis for a more co-operative partnership between unions and employers (Wallis et al, 2005). The “New” Labour government, elected in 1997, was particularly keen to support the role of trade unions in skills formation, seeing learning as *“a natural issue for partnership in the workplace between employers, employees and their trade union”*, and as offering scope for *“partnership on practical issues such as time off for learning, employer support for individual learning accounts, and training plans for staff”* (DfEE, 1998; Stewart, 2011). Reforms were put in place to enable unions to support the government’s ambition of bringing about a “Learning Age”, including the introduction of the ULF and a statutory right to paid time off for Union Learning Representatives (ULRs) to enable them to negotiate access to workplace learning opportunities. Although built on previous small-scale demonstration projects¹, this new state-promoted role marked the end of a period during which unions were almost excluded from the institutional apparatus of state training policy.

The Coalition has reaffirmed the Government’s commitment to union learning. Six months after election, it published Skills for Sustainable Growth (BIS, 2010), setting out its long-term vision for reform of the FE and Skills system. This document applauds the *“impressive track record”* and *“major role”* that Unionlearn and ULRs play *“in promoting formal and informal learning in workplaces and wider communities, especially in reaching out to those who are poorly qualified and most in need of support”* and expressing the wish to see unions promoting the benefits of Apprenticeships to disadvantaged groups and helping individuals in the workplace to access careers information and advice.

Comments left by survey participants point to:

- a firm belief in the rationale for partnership around union learning and a confidence in the benefits it brings to employers, unions and the wider community,

Union Learning is a vital part of what both employers and unions can offer their staff or members. It affects the lowest educated of our society in a positive and inclusive way, creates a good work

¹ Such as Bargaining for Skills.

atmosphere, and helps the employer with more confident, more capable staff who can enjoy Union Learning as a benefit. In addition it forges links with the community, and has long lasting and penetrating benefit upon all involved - the learners, the employer, the union and the local community.

- personal experiences of these benefits;

I was stuck in a rut. My employer's training programme became centred around my role and more often than not, badly delivered... With union learning, the opposite occurred. With a wide range of courses available, encouragement to take that first step and the variety of delivery styles, learning became fun, interesting and addictive. My confidence increased and my skills improved.

- as well as the existence of a lingering debate about the pitfalls of aligning union education with the government's skills agenda.

Union learning should be focused entirely on meeting the needs and expectations of individual learners and not directly in meeting government skills agendas. Skills acquisition is a by-product of workers becoming empowered through learning and education, and as such is centred on their needs, not those of government. Unions are in danger of making the mistake of becoming an arm of government by directing workers into areas of skills deficiency thereby meeting the aims of the Leitch report. Producing skilled workers, without the jobs, wastes time and resources and raises expectations which cannot be met.

The Union Learning Fund

The Union Learning Fund (ULF) was established in 1998. Although the focus of the fund has varied in subtle ways over the years in line with Government policy, the over-arching objective has remained the same: developing the capacity of trade unions and ULRs to work with employers, employees and training providers to encourage greater take up of learning in the workplace.

The majority of ULF funding is funnelled to union-led projects. At the start, these were often small and based in specific workplaces or localities². Over the years projects have grown and nowadays tend to focus on capacity-building and engaging of a wide range of employers across whole sectors or union footprints.

In 1998, the first year of its operation, the government grant to the ULF was just over £1m. Since then, as Table 1 shows, the scale of the grant has grown. Determining annual values is complicated by the fact that awards are made to projects lasting more than a single year. However, allowing for these fluctuations, annualised funding has recently been cut back, from £18.7 million in 2013/14 to £15.3m in 2014/15 and £14.15m in 2015/16.

² The largest single award in Round One was just £79,000.

Table 1: Union Learning Fund Values and Projects supported, 1998 to 2012/13

Funding Round	Year	Projects supported	Funding provided
Year 1	1998	28	1,022,634
Year 2	1999	68	2,781,705
Year 3	2000	93	4,734,927
Year 4	2001	103	6,487,001
Year 5	2002	62	9,155,618
Year 6	2003	44	10,339,047
Year 7	2004	44	13,863,756
Year 8	2005	30	7,690,843
Year 9	2006	24	19,394,028
Year 10	2007	17	5,388,288
Year 11	2008/9	31	21,549,569
Year 12	2009/10	10	2,420,891
Year 13	2010/11	41	27,531,739
Year 14	2011/12	7	917,739
Year 15	2012/13	43	26,828,745

Source: Unionlearn

The declining budget and growth in project size have combined to result in a fall in the cost per learner supported. In Years 1 to 3 the average cost per learner was £580. By 2013/14 (the last year for which full performance data is currently available) this had fallen to £85.37³, with values ranging from £10 to £250 per learner, depending on the focus of individual projects. Projects focused on large-scale brokerage and guidance have much lower unit costs than those delivering programmes of learning. Targets for 2015/16 have been set in the expectation of the unit cost falling further, to £80 per learner⁴.

ULF Priorities & Objectives

Priorities for each ULF funding round are agreed with the Department for Business, Innovation and Skills (BIS) and tend to reflect Departmental / Government concerns such as the importance of addressing youth unemployment; using public funding to support access and progression for disadvantaged people; promoting employer ownership of skills; creating progression opportunities from Traineeships to higher level skills; increasing responsiveness to local needs; and fostering industrial partnership (BIS, 2011; Richard, 2012; Heseltine, 2012; BIS, 2013).

The priorities for projects funded under Round 15 of the ULF, which is the focus of this evaluation, are as follows.

³ The 2013/14 budget of £18.7m was used to support 219,091 learners.

⁴ The 2015/16 budget of £14.15m includes a target of 174,102 learners supported.

- Priority 1 Greater employer ownership of the skills system** - including fostering industrial partnerships, bringing employers & stakeholders (such as colleges) closer together, reaching out to employers not engaged in employer ownership (such as SMEs) and using Learning Centres and other incentives to build investment, interest and ownership of skills.
- Priority 2 More sustainable employment for young people** - including working with employers to promote more and better quality Apprenticeships and Traineeship programmes, promoting the benefits of Apprenticeships and Traineeships to young people, promoting work experience and outreach within communities and youth groups that helps young people gain the skills and confidence needed to enter work.
- Priority 3 Build a High Skills Workforce** – including supporting the acquisition of English, Maths and functional skills; supporting vulnerable and disadvantaged union members and wider networks to engage in learning via informal routes; working with employers to develop learning agreements, training and development strategies for staff-wide communities; developing skills and progression routes; developing and enabling ULRs to make this happen.
- Priority 4 Drive up standards and quality of skills provision** – including facilitating closer working between employers and providers, promoting industrial partnerships and driving up standards of skills provision through joint learning committees and union learning centres and through work on equality and diversity, e.g. ESOL, digital inclusion and reaching out to vulnerable and hard to reach learners etc.

These annual priorities sit within a framework of long-term ULF objectives, shown in the box below.

Union Learning Fund Objectives

- Build union capacity to sustain and embed work on learning and skills so that this becomes a core activity for all trade unions.
- Develop the key role of Union Learning Representatives (ULRs) and learning champions in raising demand for learning, especially among workers with low skill levels and disadvantaged groups in the workplace.
- Maximise the union contribution to the development and delivery of the Government's strategy to improve the skills of the workforce and the performance of the economy and engagement in learning.
- Help unions and ULRs develop a framework to provide high quality information, advice and guidance to stimulate the take up of learning and promote progression.
- Help unions to engage with the established network of union-led learning centres in the workplace, union offices, non-unionised workplaces and union learning centres to offer a growing range of learning opportunities.
- Help unions to form active partnerships with employers and develop learning agreements to tackle both organisational and individual skills needs.
- Help unions to form effective partnerships with learning providers to ensure learning opportunities are customised, quality assured, relevant and delivered effectively with appropriate support given to learners.
- Develop union capacity to engage in effective partnership working with regional and national skills organisations.

It is important to note that ULF projects do not normally involve the direct delivery of training and skills. The focus is on: fostering cultures of learning and creating opportunities to learn in the workplace; working with external training providers and bringing them into the workplace to deliver programmes that meet employer and employee needs; and encouraging employees to take up the opportunities created. The emphasis is on brokerage, mentoring and guidance.

Union Learning Representatives

In order to properly understand the impact of the ULF, we need to consider the work of the 30,000 Union Learning Representatives (ULRs) who have been trained over the years (Union Learning Fund Business Plan 2013/14).

Since the 2002 Employment Act, ULRs have had the right to take reasonable paid time off work to perform their duties. Originally conceived as learning mentors providing information, advice and guidance to colleagues, today these duties cover:

- analysing learning or training needs;
- arranging and supporting learning and training;
- consulting the employer about carrying out such activities;
- preparing to carry out the above activities.

The work can also extend to accessing funds to support learning activities; establishing partnerships with external training providers; developing workplace learning resources, such as learning centres (Cowen et al., 2000: 2, Wallis et al, 2005); and negotiating learning agreements with single or groups of employers. Previous research on the impact of ULRs (Stuart, 2011) has shown that where learning agreements are in place, employers are significantly more likely to engage in a wide range of staff development practices. For example:

- 91% of employers with learning agreements were involved in addressing basic skills gaps, compared to 63% of employers without learning agreements
- 86% were involved in introducing qualifications, compared to 55%
- 69% were involved in developing a learning centre, compared to 36%
- 56% were involved in funding non work-related courses, compared to 34%
- 52% were involved in Apprenticeships, compared to 34%

The ULF provides funding both to train ULRs⁵ and to enable them to deliver these functions. Some 29% of survey respondents had taken part in training to become a ULR. As the quote below shows, these are frequently individuals who have been inspired to take up the role as a result of their own experience of union learning.

Union learning has completely changed my career. I had a degree and worked in an administrative job. Becoming involved in union learning and becoming a ULR has allowed me to get two promotions that my previous experience and qualifications would not have been applicable to. I now encourage members to participate in union learning for personal and professional development as it really can change their career, outlook and lives.

The current policy context

Although cuts to public expenditure have resulted in a reduction in its size, the ULF continues to be seen by BIS as making an important contribution to the Government's skills, growth and inclusion ambitions.

⁵ The ULF supports the delivery of a range of programmes for ULRs including accredited courses such as the ULR Stage 1 and ULR Stage 2 Awards as well as unaccredited programmes to support ongoing professional development of ULRs, such as Developing Workplace Learning or Apprenticeship Mentoring.

The underlying principles of the Coalition's skills strategy - fairness, responsibility and freedom – emphasise the responsibility that employers and individuals have for identifying and meeting their own skills needs. Government recognises that these responsibilities are accompanied by market failures: individuals may not appreciate the benefits that accrue from investments in learning; financial returns to acquiring lower-level qualifications, essential for progression, can be low; and corporate investment in skills confer benefits beyond the organisation making the investment, e.g. when employees change jobs taking their skills with them.

As a consequence, national skills policy focuses on activities such as helping individuals to make informed choices; creating clear opportunities for progression; ensuring that funding is focused on those most in need of public support (i.e. where market failures are greatest); and on qualifications / provision that deliver greatest value for money.

Although not as strongly emphasised as it was during Labour's "Learning Age", the Government continues to recognise that investments in learning yield a wide range of benefits to the state and society, such as better health, lower crime, increased civic participation, greater productivity, lower unemployment and so on. Flowing from this, alongside the ULF, Government has maintained a commitment to supporting community learning, focused on people on low incomes, with low skill levels, who are least likely to learn. The objectives for community learning have much in common with those of the ULF, being to:

- improve confidence and willingness to engage in learning
- support the acquisition of skills to prepare people for training, employment or self-employment
- improve digital and financial literacy and/or communication skills
- enable parents/carers to support and encourage their children's learning
- improve / maintain health and/or social well-being. (BIS 2011).

While there are significant differences in the objectives of the two funds - with the ULF being more workplace, employment and growth focused – the similarities between these two strands of policy create scope for benchmarking and comparison.

PARTICIPATING PROJECTS

Round 15 of the ULF supported 41 projects. A total of £14.06m was disbursed to these projects for the financial year 2013/14, through grants ranging from £2.1m for a large-scale national project delivered by Unite to £52,000 for a project delivered by Unity, formerly the Ceramic and Allied Trades Union and the National Society of Pottery Workers. Together these projects leveraged an additional £5m of employer contributions, in the form of staff time, learning centre facilities and other resources.

Eleven of these 41 projects opted to take part in the Union Learning Survey, a decision which was based on both perceived benefits and resource availability. The eleven participating projects were larger than average, accounting for 27% of all Round 15 ULF projects and 50% of Round 15 funding.

Data from the final submissions of these 11 projects⁶ shows that they created nearly 122,000 learning opportunities, equivalent to 59% of all the opportunities created under Round 15 of the ULF.

Table 2 provides a breakdown of the opportunities created by type of learning. It shows that the 11 participating projects generated around:

- 1,200 training opportunities for Union Learning Representatives
- 11,800 opportunities for people to improve their Functional Skills, English, Maths & Functional skills
- 20,000 opportunities for people to gain ICT skills at a variety of levels
- 6,350 opportunities for people to gain vocational qualifications at Level 2 and Level 3
- 15,000 Continuing Professional Development Opportunities
- 18,000 opportunities for people to progress to Further Education
- 400 opportunities for people to progress into Higher Education; and
- 4,700 Apprenticeship opportunities.

In addition, they referred 19,700 people into Informal Adult & Community Learning, provided advice via ULRs to 90,000 people and referred another 12,000 people to advice, guidance and support delivered by external organisations.

⁶ Made in April 2015

Table 2: Learning opportunities created by ULF projects

		11 x Projects in survey	All 15 ULF Round 15 Projects	% of Total
Union learning Representatives	New ULRs completing Stage 1*	673	876	77%
	ULRs completing Stage 2*	541	608	89%
	Total	1,214	1,484	82%
Functional Skills	English*	6,639	9,073	73%
	Maths*	5,151	7,872	65%
	Total	11,790	16,945	70%
ICT	Level 1*	2,953	3,608	82%
	Level 2*	1,289	2,530	51%
	Level 3*	206	374	55%
	Online basics*	4,644	6,148	76%
	Other ICT Courses*	10,947	18,598	59%
	Total	20,039	31,258	64%
Vocational Qualifications	Level 2*	5,225	13,601	38%
	Level 3*	1,131	2,239	51%
	Total	6,356	15,840	40%
Other Learning Opportunities	IACL	19,691	35,431	56%
	CPD*	14,982	35,812	42%
	FE*	18,301	22,189	82%
	HE*	399	799	50%
	Apprenticeships	4,711	6,473	73%
	Total	58,084	100,704	58%
Information Advice & Guidance	Individuals given advice by ULRs	90,134	120,936	75%
	Referrals to other organisations	11,942	24,134	49%
	Total	102,076	145,070	70%
Total Learning	Total - Union Learning Route (* asterisked)	97,483	166,231	59%
	Total Learning Inc. IACL & Apprenticeships	121,885	208,135	59%
	Total Learning & IAG	223,961	353,205	63%

Source: ULF Round 15 final submission data provided via Unionlearn

Table 2 also shows that although projects participating in the survey received 50% of Round 15 ULF funding, they expected to generate:

- 59% of all opportunities via the 'Union Learning Route' (the asterisked items in the table, which lead to full or part-qualifications);
- 59% of all opportunities including delivery of unaccredited adult & community learning and apprenticeships (but not guidance activities); and
- 63% of total opportunities, including all guidance and external brokerage activities.

It also shows that participating projects delivered a higher proportion of the learning delivered than we might expect in the following areas: training for ULRs (82%); functional

skills (70%); FE (82%); Apprenticeships (73%); and information, advice and guidance provided via ULRs (75%).

It is important to note that these output targets relate to learning opportunities, not individual learners and, as the survey shows, many union learners take up more than one learning opportunity.

Table 3 shows that differences in the balance of provision offered by projects are reflected in their unit cost per learner. The average cost per learner participating in the substantive learning opportunities⁷ (via the 'Union Learning Route') was £71 for projects taking part in the survey and £85 for all Round 15 projects.

Table 3: Cost per learner, ULF Round 15 Projects

Union / Project	Total value of bid	Cost per Learner (Union Learning Route)	Cost per Learner inc IAG via ULRs and Referrals
BFAWU	£378,382	£219	£69
CWU	£380,421	£63	£40
GMB (Y&D)	£298,990	£25	£25
GMB (South)	£620,522	£313	£139
PCS	£912,996	£346	£120
RCN	£205,738	£60	£32
UCATT	£217,743	£31	£12
UNISON - Bridges to Learning	£421,324	£145	£47
UNISON - Inclusive Learning	£660,011	£80	£14
UNITE	£2,136,488	£52	£35
USDAW	£711,985	£69	£38
All projects / unions participating in Survey	£6,944,600	£71	£35
All Round 15 projects	£14,060,789	£85	£45

Source: ULF Round 15 Applications & administrative data via Unionlearn

A detailed breakdown of the learning opportunities generated by each project taking part in the survey is given at Annex 1.

In summary, although there are some differences, the general balance and cost of provision of the support delivered by participating projects can be considered broadly representative of Round 15 ULF projects as a whole.

⁷ Excluding Adult & Community Learning, Apprenticeships and Information, Advice & Guidance.

METHODOLOGY

Although all Round 15 ULF projects had the opportunity to opt-in to the survey, the decision to participate was largely governed by resource availability, as a contribution to the cost of the survey was provided by each participating project. As stated, our analysis suggests that participating projects were broadly representative of ULF Round 15 and that extrapolating to generate an estimate of the economic impact of ULF Round 15 as a whole is not substantially compromised by the data being drawn from a sample of the overall cohort of projects.

The survey questionnaire was designed by the University of Exeter in consultation with Unionlearn and representatives of participating projects. In developing the questionnaire we referred to previous similar surveys, notably the Community Learning Learner Survey (Harding et al 2013) with a view to replicating questions to allow for comparison and benchmarking of results.

ULF funded projects are required to keep information on all learners, including those receiving advice and guidance. These records are kept by projects and at present there is no requirement to pass detailed information on to Unionlearn. The absence of a central database combined with sensitivities and legal concerns relating to the release of the learner records⁸ meant that it was not possible to randomly select survey respondents. The survey questionnaire was therefore cascaded to learners through central and regional project offices and ULRs. To maximise the response rate, learners were given the opportunity to complete the survey either online or via a paper / postal questionnaire⁹. Each union was asked to ensure that 1,000 learners were invited to participate. 5,300 paper questionnaires were printed, with the number distributed ranging from 1,000 by a project adopting an entirely postal approach to 300 by a project seeking to generate predominantly online response. The use of a cascaded email invitation means that we cannot know exactly how many learners were invited to participate and, as a result, we cannot compute a precise response rate. However, we do now that we received 2,519 responses, 1,751 (70%) of which were online and 768 (30%) received through the post. On the basis that each of the eleven projects reached 1,000 learners, the response rate would have been 23%. This is likely to be an over-estimation. On the basis that each postal questionnaire reached a learner, the response rate for postal questionnaires would have been 14.5%. This is likely to be an under-estimation.

Table 4 shows that the number of responses received varied between projects, from 66 from CWU (Communications Workers Union) supported learners to 439 from USDAW (Union of Shop, Distributive and Allied Workers). This is partly a reflection of project size. Larger projects, such as those delivered by Unite, Unison and USDAW tended to contribute a higher volume of responses. It is also partly down to the effectiveness of the approach used to contact and engage learners by each project, as well as other factors¹⁰.

⁸ Notably relating to data protection, as unions had not previously secured permission to forward learners' contact details to third parties.

⁹ Paper questionnaires were distributed within freepost envelopes which were returned to BMG Research, who handled the online survey portal and scanning of postal returns.

¹⁰ The survey was conducted during December 2014 and January 2015. This is an extremely busy time for postal and retail workers, which is likely to have depressed the response rate from these sectors. One union also offered an i-pad as an incentive for participation.

As a result, random sampling was not possible and, as is the case with all postal and online surveys, individuals participated on a self-selecting basis.

Table 4: Number of responses by union / union project

BFAWU	316	UNISON - Bridges to Learning	387
CWU	66	UNISON - Inclusive Learning	171
GMB - Southern	115	Unite	262
GMB - Yorks & N. Derbyshire	76	USDAW	439
Merseylearn	4	Other	101
PCS	237	Unsure / prefer not to say	115
RCN	104	Not provided	13
UCATT	113	Total	2519

PROFILE OF COURSES

The survey explored the kind(s) of learning that respondents (“union learners”) had undertaken, how often they had taken part and when they had last participated. It also examined their main motivation for engaging in union learning and whether their learning had resulted in a qualification.

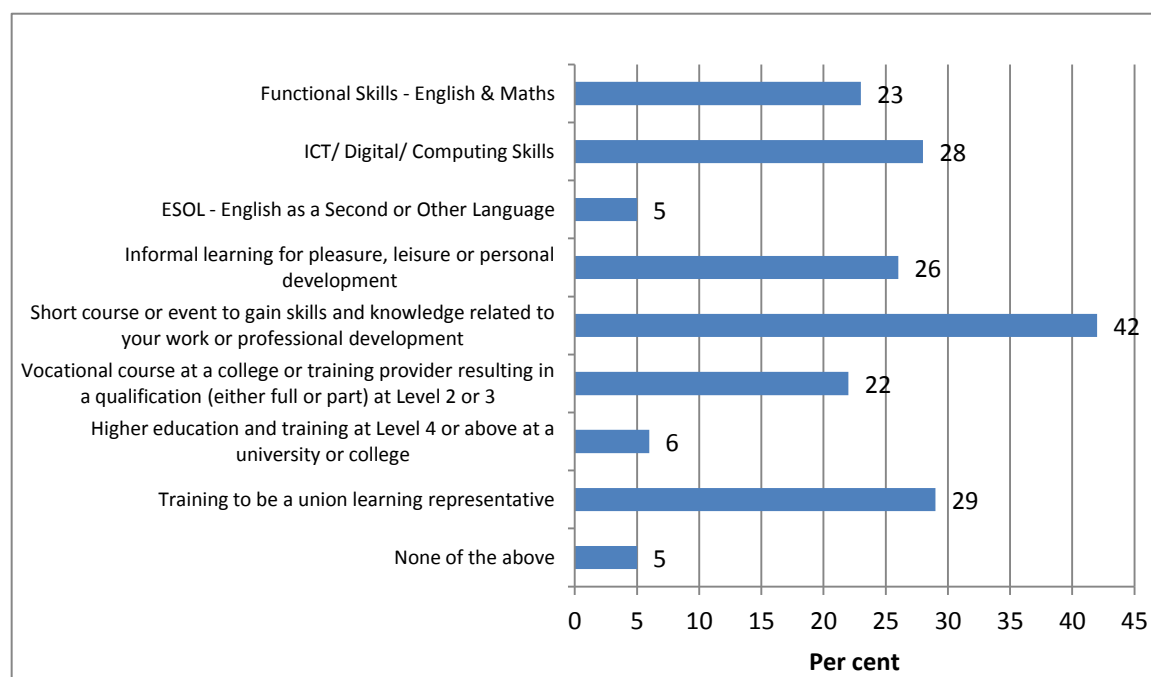
Type of union learning

The responses show that short courses or events to gain skills and knowledge related to learners’ work or professional development was the most common form of learning. More than two-fifths (42%) of respondents indicated that they had undertaken this type of learning. A slightly lower proportion of union learners had participated in:

- Training to be a Union Learning Representative (29%)
- ICT/Digital/ Computing Skills (28%)
- Informal learning for pleasure, leisure or personal development (26%)
- Functional skills – English and Maths (23%)
- Vocational course at a college or training provider that resulted in a qualification at Level 2 or Level 3 (22%).

Other kinds of learning such as learning ESOL (5%) or Higher education and training at a university or college (6%) were undertaken by a minority of respondents. 5% of learners taking part in the survey participated in other forms of learning not identified above.

Figure 1: What kind(s) of union learning have you taken part in?



Base: 2,519. Multiple responses

People who participate in union learning frequently take part in more than one episode of learning (see below). They combine different types of learning and may, on occasion, undertake more than one episode of the same type of learning. This makes it impossible directly to compare the data in Figure 1, showing the types learning undertaken by individual respondents, with Table 2, showing the types of learning opportunities offered by ULF projects. However, a very broad assessment of the two would suggest that people who took part in training to become a ULR, Higher Education and Short Courses / CPD are over-represented in the sample while ESOL and functional skills learners are under-represented.

Frequency of learning

Table 5 shows that roughly two-fifths (38%) of respondents had taken part in just one episode of union learning. Those taking part in union learning more than once, are split between those that have taken part between two or three episodes of union learning (31%) and those that have taken part four times or more (31%).

While 38% of respondents had participated in a single episode of learning, 52% had participated in a single type of learning. This means that 14% of respondents took part in more than one episode of the same type of learning; nearly half (48%) were multiple episode learners who had combined different types of learning, among whom 21% had combined two types of learning, 11% three types, 6% four types and 6% five or more types.

Most respondents had taken part in union learning relatively recently with 56% taking part within the last 6 months and three-quarters (74%) taking part within the last 12 months.

Table 5: Frequency of Union Learning

When last took part ...	Times taken part in union learning ...					All	Base
	Once	Twice	Three times	Four to six times	More than six times		
Within last month	11	4	3	3	7	29	720
Between 1 and 6 months ago	10	5	3	3	6	27	679
Between 7 and 12 months ago	6	4	3	2	3	18	440
Between 13 and 24 months ago	5	3	2	2	3	14	355
Over 24 months ago	5	2	1	1	2	12	291
All	38	18	13	11	20	100	-
Base	931	458	324	274	497	-	2485

The role that union learning plays in enabling participants to experience a wide range of opportunities and encouraging them to become “lifelong learners” was evident from respondents’ comments.

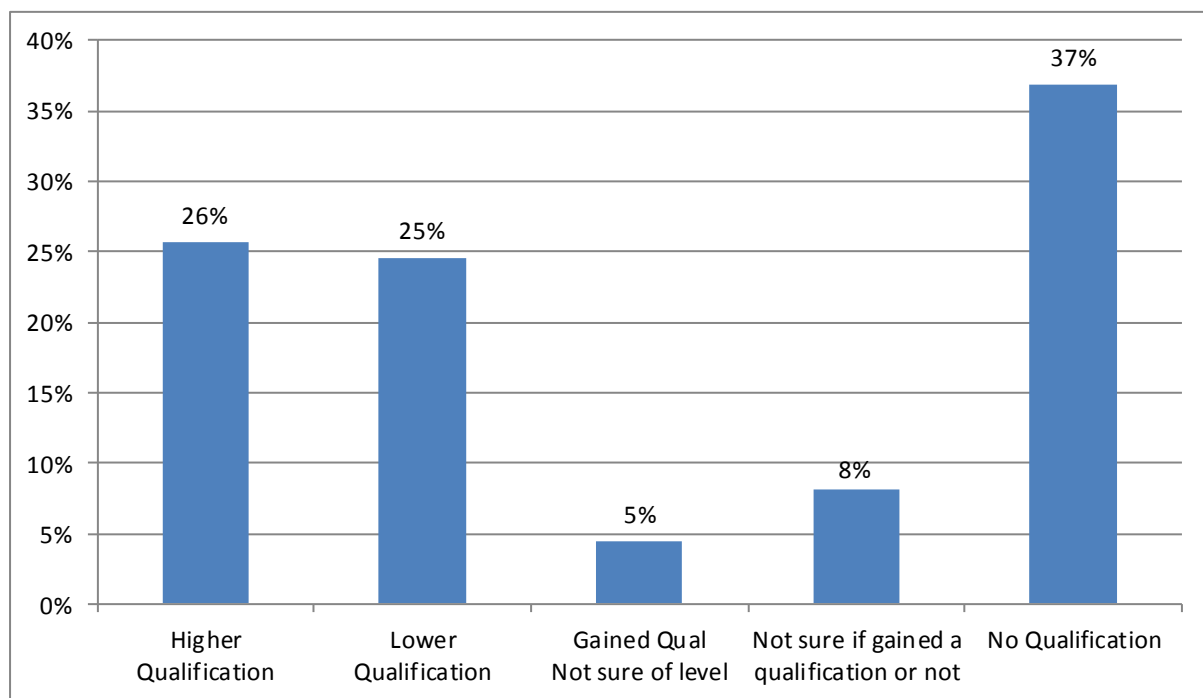
In the 10 years I have been learning skills for life I have gained 5 qualifications. Literacy, Maths, CLAIT, ECDL and ITQ which is not bad considering I could not spell and speak well. So I would say thank you and you are never too old to learn. So if anybody is thinking about it “go for it”.

Bridges to learning helped me gain confidence. I never thought I would enrol onto a learning course but after enrolling on an informal learning course I went on to do Maths, English and ICT and now have proper qualifications thanks to (name of ULR withheld).

Attainment of qualifications

Over half (56%) of respondents had gained a qualification or part of a qualification as a result of their learning. Those who were sure about the level of their qualification, were evenly split between those gaining a qualification at a level higher than other qualifications they already held (26%) and those gaining qualifications at the same or lower level than their existing qualifications (25%). A further 5% gained a qualification but were unsure of its level. Over a third of learners (37%) did not gain a qualification while 8% were unsure whether they had achieved a qualification or not.

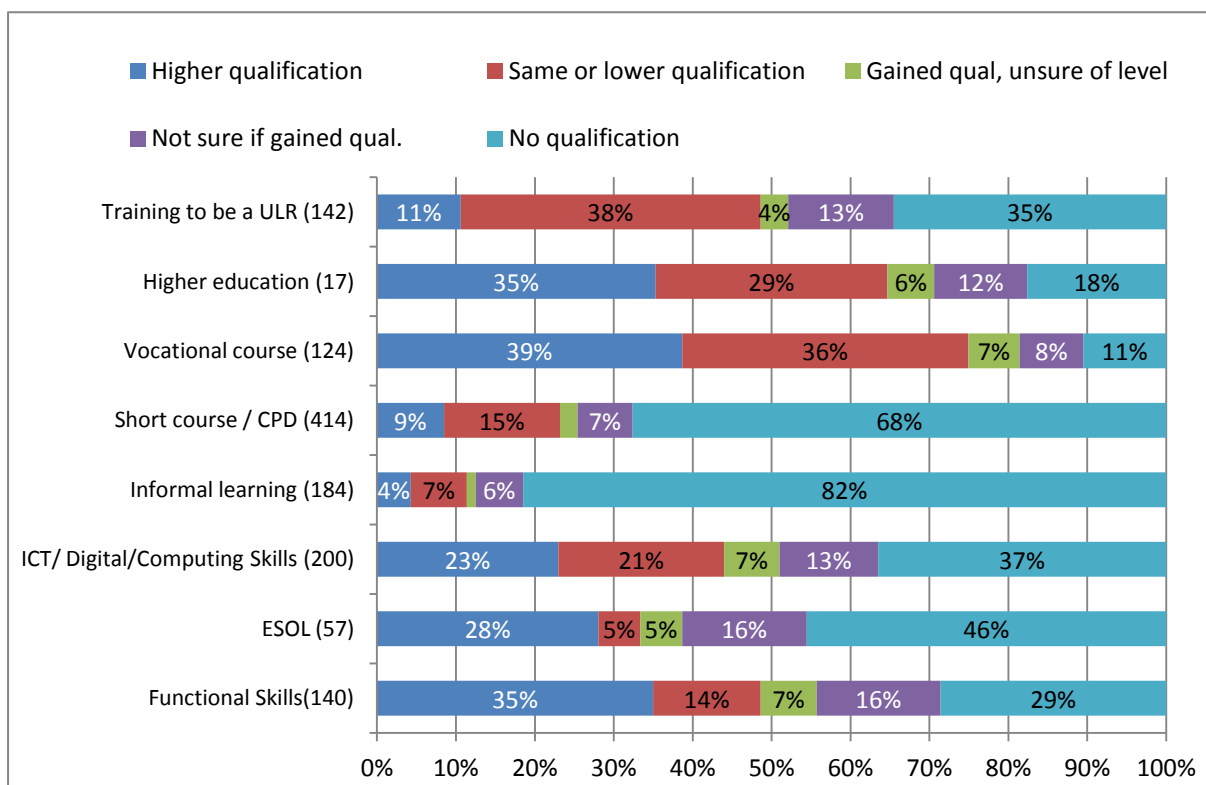
Figure 2: Qualifications gained as a result of union learning



Base: 2,476 [Note: recoded Q5 and Q6]

Isolating learners who took part in a single type of learning allows us to examine whether some forms of learning are more likely to lead to qualifications than others. Figure 3 shows learners undertaking vocational courses (82%) or higher education or training (71%) were most likely to have achieved a qualification. This proportion falls to just over half of learners taking part in training to be a ULR (53%) to gain functional skills (56%) and ICT skills (51%); four fifths of those taking part in ESOL (38%); a quarter (26%) of those participating in short courses or events and 12% of those taking part in informal learning for leisure, pleasure and personal development.

Figure 3: Type of learning by qualification level

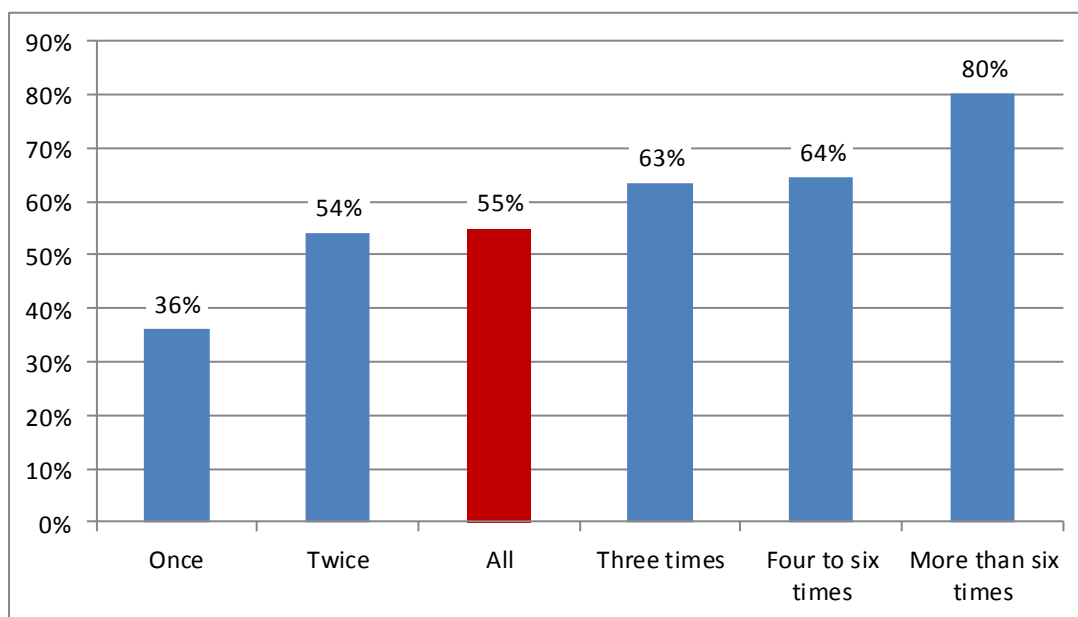


Base: 1,278

Respondents who gained qualifications at a higher level than the qualifications they already held ("higher qualifications") were most likely to be undertaking higher education or training at Level 4 (35%), vocational courses at Level 2 or Level 3 (39%), Functional Skills training (35%) or ESOL (28%).

Figure 4 also shows that likelihood of having attained a qualification through union learning is heavily influenced by the number of episodes of learning undertaken and that learners who had participated in over six courses were more than twice as likely to have gained a qualification (at any level) than those who had participated in only one course.

Figure 4: Attainment of qualifications by number of episodes of learning



Base: 2,466

The comments below illustrate the value that union learners place on gaining qualifications, the impact these qualifications can have on learners' lives as well as the disappointment that can be generated when things go wrong.

They have been really supportive and giving me the opportunity to get qualifications which I did not have on being redundant - as in a piece of paper to prove those abilities - has really helped.

Union learning changed my life. I left school with no qualifications and was in a dead end job with few prospects. Through the union I have become a professionally qualified person with a career and a future. I attended Ruskin College and did a degree at Lancaster University. Yet at school I was the dunce and teachers had written me off. The union has been like a supportive family always in my corner cheering me on, celebrating my success and supporting me through the challenges. As a humble care worker I would never have been able to afford or have the confidence to do this on my own. Union education gave me the confidence to get out of an abusive marriage and to make a success of my life.

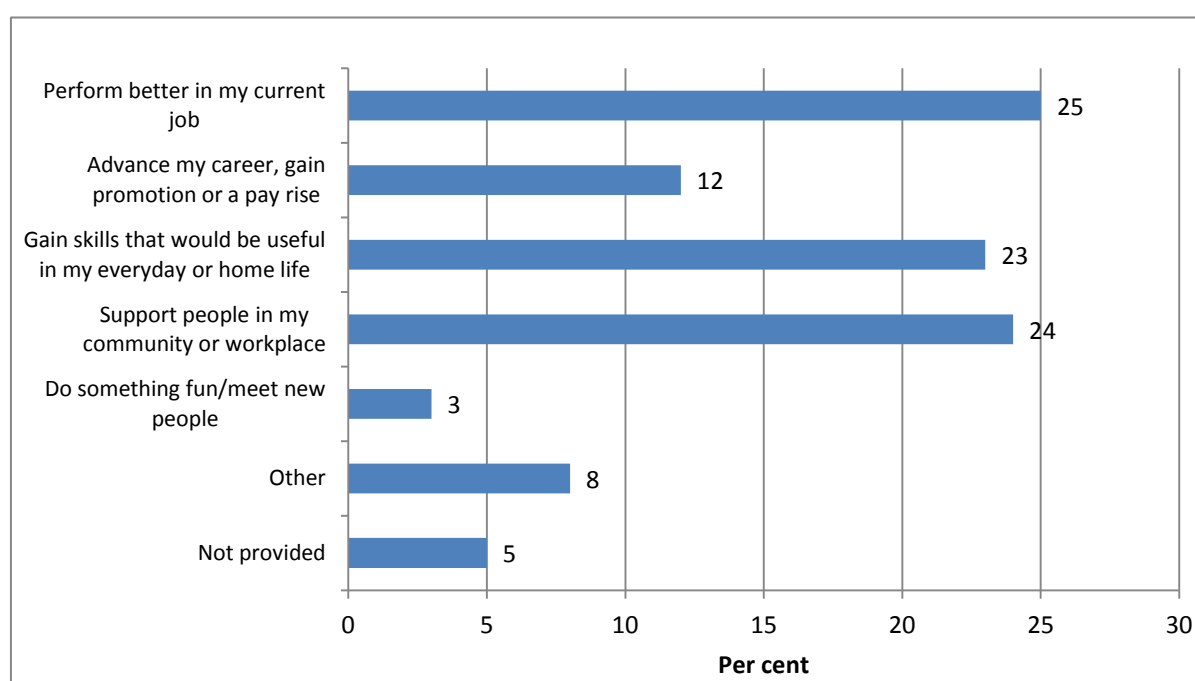
My place of work [name] tried to organise a computer course but only 10 people signed up and only 3 completed the course in full due to lack of organisation and effort by [name]. This was only the first level and the union didn't really have any info when problems arose. Myself personally passed first and am still waiting for a certificate to acknowledge the fact I passed.

Reasons for taking part in union learning

Most learners fall into one of three groups in terms of their principal motivation to learn.

- 1) An employment orientated group, which is the largest of the three, accounting for 37% of learners. It encompasses:
 - those that aspire to perform better in their current job (25% of learners);
 - those that want to advance their career, gain promotion or a pay rise (12% of learners).
- 2) Those motivated by a desire to support people in their community or workplace, which accounts for 24% of learners.
- 3) Those motivated to gain skills that would be useful in their everyday life, which accounts for 23% of learners.

Figure 5: What was your main motivation for taking part in union learning?



Although only a few learners cited a desire to do something fun or meet new people as their main motivation (3%), the pleasure derived from participating in union learning was clear from respondents' comments. The comments also demonstrate that many learners had more than one motivation for participating in learning.

It is fun, it give us the opportunity to meet other people from different departments and backgrounds. It enhances our skills, gain more confidence. Explore hidden skills and gain knowledge that can be applied in everyday life.

I look forward to Tuesdays to meet friends and learn computers.

Motivation by type of learning

Table 6 examines the extent to which learners undertake particular kinds of learning in order to achieve particular outcomes. It suggests that:

- The desire to perform better in their current job or to advance their career, gain promotion or a pay rise was the main motivation for all forms of learning apart from informal learning, learning for leisure, pleasure or personal development and training to become a ULR. These employment-oriented objectives were cited by three quarters of those participating in higher education and around half those participating in Functional skills, ICT, ESOL, Short courses and Vocational training.
- The desire to gain skills useful in every-day and home life was a common motivation for those participating in Functional skills (38%), ICT (42%) ESOL (34%) and those involved in informal learning (26%); and
- The desire to support people in their community or workplace was the dominant motivation for those training to become a ULR (70%).

Table 6: Type of learning by main motivation for undertaking union learning

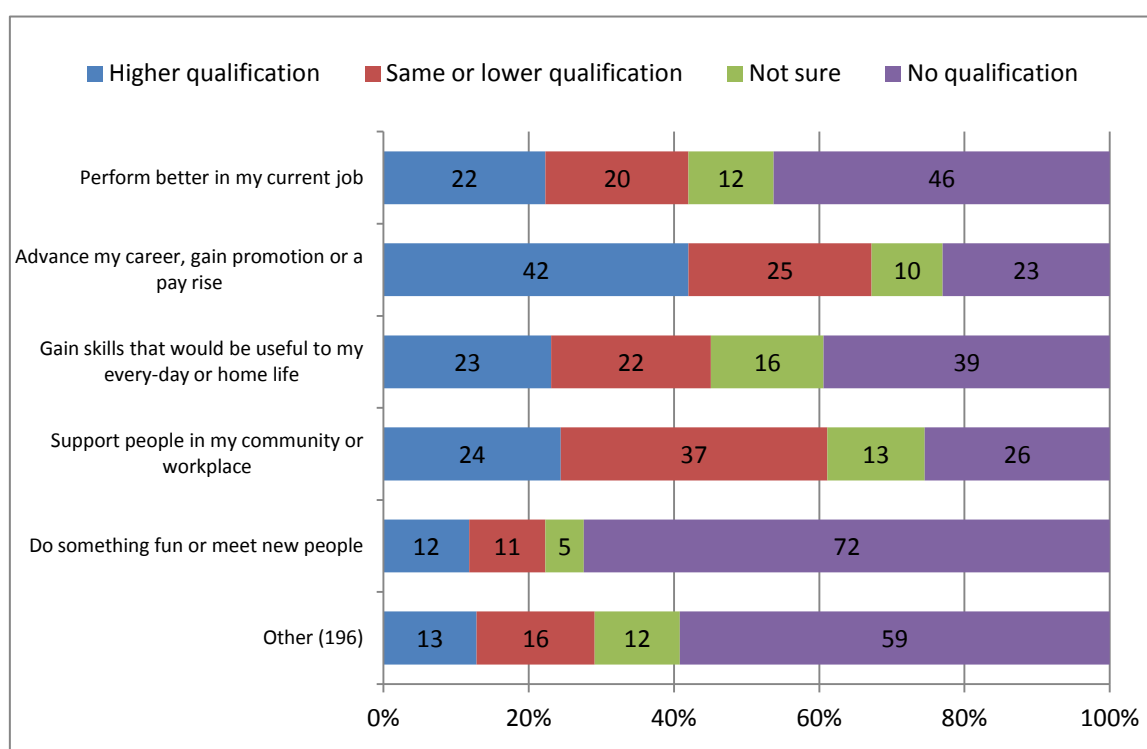
Type of learning	Perform better in my current job	Advance my career, gain promotion or a pay rise	Gain skills that would be useful in my every-day or home life	Support people in my community to workplace	Do something fun or meet new people	Other	Base
Functional skills	33	19	38	5	2	4	134
ICT/digital/computing	34	15	42	7	1	4	200
ESOL	50	5	34	7	0	4	56
Informal learning	13	14	26	10	18	20	185
Short course	47	7	20	19	2	5	409
Vocational course at Level 2 or 3	23	26	16	17	2	16	122
Higher education at Level 4 or above	35	35	6	12	0	12	17

Motivations by achievement of qualifications

The proportion of respondents gaining qualifications was highest among learners whose prime motivation for participating in learning was to advance their career, gain promotion or a pay rise (67%) or to support people in their community or workplace (61%). The latter is a slightly surprising and is probably explained by high levels of participation in qualification bearing courses for ULRs. Just over two fifths of those motivated to perform better in their current job (42%) and those motivated to gain skills in their everyday life (45%) gained qualifications. The group least likely to gain qualifications were those learning for fun or to meet new people (23%).

It is notable that learners who were seeking to advance their career, gain promotion or a pay rise were significantly more likely to gain qualifications at a higher level than learners with other motivations.

Figure 6: Qualification gained by main motivation for undertaking union learning



Base: 2,476

PROFILE OF LEARNERS

This section looks at the profile of union learners, comparing them to community learners and the general adult population. The data for community learners is taken from the “Community Learning Learner Survey” (CLLS) report (BIS 2013). The data for the general population is from the Annual Population Survey for the period October 2013 to September 2014¹¹.

- The main characteristics of union learners (

¹¹ Accessed via NOMIS.

- Table 7) are as follows.
- The gender profile of union learners is broadly balanced, with a slight bias towards women. This mirrors the general population but contrasts with the CLLS population which is heavily skewed towards female learners (76%).
- 93% of union learners are aged between 25 to 64 years old. Younger and older people, who are less likely to be employed, account for a smaller share of union learners than community learners or the general population.
- The ethnic profile of union learners is broadly comparable to that of general population, with 85% describing themselves as White, compared to 88% of the general population and 81% of the CLLS population. Looking in more detail, 77% described themselves as 'White British' and 8% as 'White Other'. This compares to 6% of the general population identifying as 'White Other' in Census 2011.
- English was not the first language of 10% of union learners. This is a lower proportion than the CLLS population (17%) but a higher proportion than the general population of England (8%).
- 15% of union learners said that they had a disability. This is a lower than the CLLS (23%) or the general population (18%). It is likely to be due to differences in the ages of these populations (13% of the working age population has a disability). The fact that union learners are likely to be in employment (and large numbers of people in the general population with a disability are not in employment) will also account for the difference.

Table 7: Demographic profile of union learners compared to community learners and the general population

Characteristic	Union learning	Community learning ¹²	General population ¹³
Gender			
Male	46%	24%	49%
Female	53%	76%	51%
Prefer not to say	1%	-	-
Age			
16 to 24	4%	12% (under 29)	14%
25 to 49	53%	40% (30 to 49)	43%
50 to 64	40%	36% (50 to 69)	22%
65 or over	2%	12% (70 or over)	21%
Prefer not to say	1%	-	-
Ethnic Origin			
White	85%	81%	88%
Ethnic minority	14%	17%	12%
Prefer not to say	2%	-	-
English first language			
Yes	89%	83%	92% ¹⁴
No	10%	17%	-
Prefer not to say	1%	-	-
Disability			
Have a disability	15%	23% ¹⁵	18% ¹⁶
Do not have a disability	83%	76%	81%
Prefer not to say	2%	1%	-

Employment and education characteristics

- Union learning survey respondents differ markedly from CLLS respondents and the general population in terms of their economic status. 89% of union learners are employed, either full or part-time, compared to 59% of the general population and just 38% of CLLS respondents. Very few union learners were self-employed.

¹² https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/128775/13-691-community-learning-learner-survey-march-2013.pdf.

¹³ Annual Population Survey, 16 and over. (Oct 2013-Sep 2014).

¹⁴ Census data on proportion of population with English as their 'main' language.

¹⁵ Longstanding health condition or illness.

¹⁶ Long-term health problem or disability.

- Most union learners have permanent contracts of employment (82%). However, a sizeable minority are agency workers or work on fixed term or temporary contracts (16%) or are receiving income-related benefits (8%).
- While union learners were slightly more likely than community learners or the general population to hold any qualification, they were less likely to hold qualifications at degree level or above. A sizeable minority of union learner respondents held low level qualifications or qualifications from abroad.

Table 8: Employment and educational characteristics

Characteristic	Union learning	Community learning	General population
Economic status (n=2,514)			
Employed full time	71%	17%	43% ²
Employed part time	17%	14%	16% ²
Self-employed	1%	7%	9%
Unemployed	1%	10%	4%
Other (mainly economically inactive)	3%	53%	37%
Prefer not to say	2%	-	-
Contract type (n=2,372)			
Fixed term or temporary contract	13%	-	-
Agency worker	3%	-	-
Permanent job	82%	-	-
Prefer not to say	1%	-	-
Income-related benefits/tax credits (n=2,490)			
Yes	8%	20%	-
No	86%	76%	-
Not sure/ prefer not to say	6%	4%	-
Highest qualification			
Degree or higher	26%	37%	35% ¹
Lower than degree	68%	50%	56% ¹
No qualification	7%	9%	9% ¹

¹ Population aged 16 to 64. ² Includes self-employed.

Base: 2,491

PATTERNS OF LEARNING

This section explores the extent to which factors such as gender, age or employment status impact on the type of learning undertaken; motivations for learning and attainment of qualifications.

Table 9 suggests that:

- **Frequency of learning** - Gender does not have a significant impact on the frequency of learning.
- **Type of learning** - Almost half of women had undertaken short courses or attended an event¹⁷; women were more likely to have undertaken learning for pleasure, leisure or personal development; and less likely to have undertaken most other forms of learning. In particular, they were less likely than men to have undertaken training in ICT or vocational courses leading to Level 2 or Level 3 qualifications.
- **Qualification** - As a consequence of the nature of the learning undertaken, a higher proportion of women (45%) than men (29%) participated in learning that did not lead to a qualification. A lower proportion of women (22%) than men (30%) also gained a qualification at a higher level than the qualifications they already held.
- **Motivation** – The proportion of men and women who cited a desire to advance their career, gain promotion or a pay rise or to gain skills that would be useful in every-day life was very similar. A higher proportion of women (32%) than men (21%) cited the desire to perform better in their current job as their primary motivation, while a greater proportion of men (30%) than women (22%) cited the desire to support people in their community or workplace¹⁸.

Table 9: Patterns of learning by gender

	Male	Female	ALL
Frequency of learning			
Once	37	38	37
Twice	17	20	18
Three times	11	14	13
Four to six times	11	11	11
More than six times	24	17	20

¹⁷ The high level of female participation in short courses and events may be partly a product of the gender balance of the project delivered by the Royal College of Nursing, which has a particular CPD focus. However, as this project accounts for only 4% of all responses, this cannot be the sole reason.

¹⁸ This may be partly explained by the fact that a higher proportion of male (32%) than female (26%) respondents had undertaken training to be a Union Learning Representative.

<i>Base</i>	<i>1,128</i>	<i>1,307</i>	<i>2,459</i>
Type of learning			
Functional skills – English & Maths	26	20	23
ICT/Digital/Computing skills	34	23	28
ESOL – English as a Second or Other Language	6	4	5
Informal learning	24	27	26
Short course or event	37	47	43
Vocational course at a college or training provider	26	19	22
Higher education and training at Level 4	6	6	6
Training to be a union learning representative	32	26	29
None of the above	5	5	5
<i>Base</i>	<i>1,136</i>	<i>1,314</i>	<i>2,474</i>
Qualification level of last learning			
Higher qualification	30	22	25
Same or lower qualification	26	23	24
Not sure	15	11	13
No qualification	29	45	37
<i>Base</i>	<i>1,122</i>	<i>1,296</i>	<i>2,441</i>
Motivation for learning			
Perform better in my current job	21	32	26
Advance my career, gain promotion or pay rise	14	12	13
Gain skills that would be useful in my every-day life	25	24	24
Support people in my community or work place	30	22	25
Do something fun or meet people	2	4	3
Other	9	7	8
<i>Base</i>	<i>1,077</i>	<i>1,251</i>	<i>2,351</i>

Age

Table 10 suggests that:

- **Frequency of learning** – The older learners are, the greater number of episodes of union learning they are likely to have taken part in.
- **Type of learning** – Older people are more likely to have participated in informal learning; ICT/Digital/Computing skills training; and training to become a Union

Learning Representative. Younger people are more likely to have taken part training in ESOL, while those aged 25 to 49 are slightly more likely than older or younger learners to have participated in functional skills training. The proportion of people participating in vocational courses and higher education does not appear to be significantly influenced by age.

- **Qualification** – The proportion of 25 to 49 year olds and of 50 to 64 year olds gaining qualifications as a result of their participation in learning is similar. The differences occur at each end of the spectrum. The proportion of young people aged 16 to 24 gaining higher qualifications (36%) was significantly larger than that that for older people aged 65 and over (22%). Conversely, the proportion of older learners aged 65 and over who did not gain qualifications as a result of their learning (46%) is higher than that found for younger learners aged 16 to 24 (30%).
- **Motivation** – Younger people are significantly more likely to be learning in order to advance their career, gain promotion or a pay rise and slightly more likely to be participating in learning in order to perform better in their current job than older people. Older learners are more likely to be participating in union learning in order to support people in their community or workplace, while learners aged 65+ are also significantly more likely to be participating in learning in order to do something fun and to meet new people.

Table 10: Patterns of learning by age

	16-24	25-49	50-64	65+	Prefer not to say	ALL
Frequency of learning						
Once	57	41	32	25	54	37
Twice	23	19	17	21	14	18
Three times	11	14	13	11	14	13
Four to six times	3	10	13	11	9	11
More than six times	6	17	26	32	9	20
Base	88	1,314	1,003	53	35	2,493
Type of Learning						
Functional skills – English & Maths	20	25	22	19	9	23
ICT/Digital/Computing skills	18	25	32	40	9	28
ESOL – English as a Second or Other Language	11	7	3	6	3	5
Informal learning	19	25	27	32	17	26
Short course or event	35	39	47	43	29	42
Vocational course at a college or training provider	19	24	21	23	9	22

Higher education and training at Level 4	3	6	7	6	3	6
Training to be a union learning representative	9	25	35	30	23	29
None of the above	3	4	5	11	26	5
<i>Base</i>	94	1,321	1,012	53	35	2,515
Qualification level of last learning						
Higher qualification	36	26	26	22	9	26
Same or lower qualification	14	25	25	22	18	24
Not sure	21	14	10	10	15	13
No qualification	30	36	39	46	59	37
<i>Base</i>	88	1302	999	50	34	2,473
Motivation for learning						
Perform better in my current job	33	27	26	12	9	26
Advance my career, gain promotion or pay rise	26	16	9	0	0	13
Gain skills that would be useful in my every-day life	21	25	24	22	20	24
Support people in my community of work place	8	20	32	43	23	25
Do something fun or meet people	4	3	3	14	17	3
Other	8	9	7	8	31	8
<i>Base</i>	76	1,242	976	49	35	2,378

Ethnicity

Table 11 suggests that:

- **Frequency of learning** – Respondents who identified as Black / Black British and White British were slightly more likely to have participated in union learning on three or more occasions. There are significant differences in the frequency of learning across different minority ethnic communities. 26% of respondents identifying as being Black or Black British participated in learning more than six times, compared to 10% of respondents identifying as being Asian or Asian British. People identifying as Asian or Asian British were significantly more likely (56%) than average (38%) to have only participated in one episode of union learning.
- **Type of learning** – Respondents from minority ethnic communities were less likely to have participated in short courses / events, vocational training and training to be a ULR than respondents who described themselves as White British. They were more likely to have participated in functional skills training and ESOL.

There are, again, significant differences between minority ethnic communities. People identifying as Asian or Asian British had particularly low rates of participation

in ICT skills training, higher education and training to be a ULR, but higher than average rates of participation in vocational training. Respondents identifying as White Other were significantly more likely to participate in ESOL provision and higher education, while those identifying as Black or Black British were more likely to have participated in functional skills training.

- **Qualification** – Ethnicity appears to have some impact on the likelihood of gaining a qualification. Respondents identifying as Black or Black British and as White Other were more likely to have gained a qualification and more likely to have gained a qualification at a higher level than the qualifications they already held. The opposite is true for learners identifying as Asian or Asian British.
- **Motivation** – People from minority ethnic communities, particularly those identifying as Asian or Asian British, more frequently stated that their motivation for participating in union learning was to advance their career, gain promotion or a pay rise. The desire to perform better in their current job was also more frequently cited as a White Other and Black or Black British respondents. People identifying as White British were more likely than others to state that their primary motivation was to support people in their community or workplace.

Table 11: Ethnicity by type of learning

	Asian or Asian British	Black or Black British	White British	White Other	Other	Prefer not to say	ALL
Frequency of learning							
Once	56	34	36	42	43	45	38
Twice	18	18	18	16	27	21	18
Three times	9	12	14	14	9	14	13
Four to six times	7	10	12	7	6	7	11
More than six times	10	26	21	21	16	13	20
Base	116	125	1,911	196	89	56	2,493
Type of Learning							
Functional skills – English & Maths	25	32	21	29	28	18	23
ICT/Digital/Computing skills	16	34	29	22	25	14	28
ESOL – English as a Second or Other Language	11	7	2	25	28	5	5
Informal learning	31	28	26	21	27	23	26
Short course or event	26	35	45	30	33	30	43
Vocational course at a college or training provider	27	20	24	17	10	11	22
Higher education and training at Level 4	2	4	6	10	3	5	6
Training to be a union learning representative	17	25	31	27	13	27	29

None of the above	4	2	5	6	4	21	5
Base	116	125	1,911	196	89	56	2,493
Qualification level of last learning							
Higher qualification	21	33	25	33	29	13	26
Same or lower qualification	21	26	26	18	15	20	25
Not sure	15	9	12	17	19	18	13
No qualification	42	32	37	32	37	50	37
Base	117	121	1,899	190	89	56	2,472
Motivation for learning							
Perform better in my current job	21	28	26	32	29	11	26
Advance my career, gain promotion or pay rise	23	16	12	13	15	2	13
Gain skills that would be useful in my every-day life	25	31	24	20	29	22	24
Support people in my community or work place	16	19	27	25	12	28	25
Do something fun or meet people	2	3	3	2	7	9	3
Other	14	4	8	8	7	28	8
Base	110	111	1,835	186	82	54	2,378

First language

Unsurprisingly, many of data patterns found in the ethnicity-related analysis (above) are also found in the data for participation by first language. Table 12 shows that:

- **Frequency of learning** – Nearly half (47%) of respondents with English as a first language had taken part in three or more union learn courses, compared to a quarter (26%) of those who did not have English as a first language.
- **Type of learning** – Respondents who did not have English as a first language were more likely to have participated in ESOL (31% v 2%) and functional skills (31% v 22%) training and less likely to have participated in all other forms of learning.
- **Qualification** – A higher proportion of respondents who did not have English as a first language (42%) took part in learning that did not lead to a qualification than learners with English as a first language (37%). This may be a function of the frequency of learning, in that the more courses that are attended the greater the likelihood is that at least one of these will be accredited.
- **Motivation** – Respondents who did not have English as a first language were more likely to be motivated to learn by a desire to perform better in their current job, to advance their careers, gain promotion or a pay rise, or to gain skills that would be

useful in everyday life. Those with English as a first language were significantly more likely to cite the desire to support people in their community or workplace as being their primary motivation for learning.

Table 12: First language by type of learning

	English is first language	English not first language	All
Frequency of learning			
Once	35	54	37
Twice	18	20	18
Three times	14	8	13
Four to six times	12	6	11
More than six times	21	12	20
<i>Base</i>	<i>2,220</i>	<i>250</i>	<i>2,489</i>
Type of Learning			
Functional skills – English & Maths	22	31	
ICT/Digital/Computing skills	29	20	
ESOL – English as a Second or Other Language	2	31	
Informal learning	26	23	
Short course or event	45	19	
Vocational course at a college or training provider	23	14	
Higher education and training at Level 4	6	4	
Training to be a union learning representative	31	11	
None of the above	5	1	
<i>Base</i>			
Qualification level of last learning			
Higher qualification	26	25	26
Same or lower qualification	26	14	25
Not sure	12	20	13
No qualification	37	42	37
<i>Base</i>	<i>2,204</i>	<i>245</i>	<i>2,468</i>
Motivation for learning			
Perform better in my current job	26	31	26
Advance my career, gain promotion or pay rise	13	17	13
Gain skills that would be useful in my every-day life	24	28	24
Support people in my community or work place	27	12	25

Do something fun or meet people	3	3	3
Other	8	10	8
<i>Base</i>	<i>2,124</i>	<i>232</i>	<i>2,375</i>

Disability

Table 13 suggests that:

- **Frequency of learning** – Over half (56%) of respondents with a disability had taken part in three or more union learn courses, compared to four fifths (43%) of those without a disability.
- **Type of learning** – Disability appears to have little impact on participation in different types of learning undertaken. There is one exception, which is that a higher proportion respondents with a disability participated in training to become a ULR Representative (36%) than those without a disability (27%).
- **Qualification** – Respondents with a disability were slightly more likely both to have attained a qualification and to have attained a qualification at a higher level than those without a disability. This may be due the people with a disability being more likely to participate in multiple learning episodes.
- **Motivation** – Consistent with their propensity to train as Union Learning Representatives, the proportion of respondents with a disability who identified supporting people in their community or workplace as their primary motivation for learning (31%) was higher than the proportion of respondents without a disability (24%).

Table 13: Disability by type of learning

	Disability	No disability	All
Frequency of learning			
Once	29	39	38
Twice	15	19	18
Three times	17	13	13
Four to six times	12	11	11
More than six times	27	19	20
<i>Base</i>	<i>380</i>	<i>2,050</i>	<i>2,483</i>
Type of Learning			
Functional skills – English & Maths	27	22	23

ICT/Digital/Computing skills	28	28	28
ESOL – English as a Second or Other Language	7	5	5
Informal learning	28	25	26
Short course or event	41	43	42
Vocational course at a college or training provider	22	22	22
Higher education and training at Level 4	9	6	6
Training to be a union learning representative	36	27	29
None of the above	5	5	5
<i>Base</i>	386	2066	2,505
Qualification level of last learning			
Higher qualification	29	25	26
Same or lower qualification	24	25	25
Not sure	16	12	13
No qualification	31	38	37
<i>Base</i>	377	2,034	2,463
Motivation for learning			
Perform better in my current job	25	27	26
Advance my career, gain promotion or pay rise	9	14	13
Gain skills that would be useful in my every-day life	23	25	24
Support people in my community or work place	31	24	25
Do something fun or meet people	3	3	3
Other	10	8	8
<i>Base</i>	355	1,960	2,368

Economic status

The vast majority of union learners are employed, either full-time or part-time. The limited volume of data on other economically active respondents¹⁹ and economically inactive respondents²⁰ makes it difficult to draw conclusions for these groups. Nonetheless, Table 14 suggests that:

- **Frequency of learning** - Nearly half (47%) of full-time employees had taken part in three or more union learn courses, compared to one third (35%) of part-time employees.
- **Type of learning** – Consistent with their higher frequency of learning, full-time employees were more likely than part-time employees to have participated in most types of learning, notably functional skills, ICT, Vocational Courses, Higher education and training to be a Union Learning Representative. Part-time employees showed high levels of participation in short courses and events. Economically inactive respondents (likely to be people who have retired or who may have a long-term health condition that keeps them out of the labour market) had a higher than average propensity to participate in ICT training and informal learning.
- **Qualification** – The proportion of part-time employees (43%), other economically active (45%) and economically inactive (54%) learners who did not gain a qualification as a result of union learning was significantly higher than the proportion of full-time employees (34%). Full-time employees were also more likely to gain qualifications at a higher level than the qualifications they already held.
- **Motivation** – The differences in motivations for learning between full-time and part-time employees were not great. Economically inactive respondents were much more likely to participate in learning in order to support people in their community or workplace or to do something fun or meet new people.

Data from the Annual Population Survey suggests that around 24% of part-time employees have undertaken job-related training in the last 13 weeks, compared to 27% of full-time employees. The analysis above suggests that, alongside this lower than average propensity to participate in learning, part-time employees who participate in union learning may learn less frequently and participate in shorter courses which are less frequently accredited. Union learners who were self-employed, unemployed or economically inactive were also less likely to acquire qualifications.

Table 14: Economic status by type of learning

	Employed Full time	Employed part time	Other economic ally active	Economic ally inactive	ALL
Frequency of learning					

¹⁹ Includes those who are self-employed and those who are not employed and looking for work.

²⁰ Includes those who are retired and those who are not employed and not looking for work.

Once	35	46	32	29	37
Twice	18	19	19	18	18
Three times	14	11	12	16	13
Four to six times	12	8	12	8	11
More than six times	21	16	25	29	20
<i>Base</i>	1897	428	57	49	2492
Type of Learning					
Functional skills – English & Maths	25	17	5	12	23
ICT/Digital/Computing skills	30	19	19	47	28
ESOL – English as a Second or Other Language	5	4	7	6	5
Informal learning	26	25	17	39	26
Short course or event	41	46	48	43	42
Vocational course at a college or training provider	23	18	35	18	22
Higher education and training at Level 4	7	4	2	6	6
Training to be a union learning representative	31	21	21	35	29
None of the above	5	5	2	10	5
<i>Base</i>	1,912	434	58	49	2,514
Qualification level of last learning					
Higher qualification	27	21	20	19	26
Same or lower qualification	25	24	34	19	25
Not sure	14	12	2	8	13
No qualification	34	43	45	54	37
<i>Base</i>	1,883	423	56	48	2,471
Motivation for learning					
Perform better in my current job	27	31	21	10	26
Advance my career, gain promotion or pay rise	13	12	18	0	13
Gain skills that would be useful in my every-day life	24	25	19	17	24
Support people in my community or work place	26	21	23	48	25
Do something fun or meet people	2	4	7	13	3
Other	8	7	12	13	30
<i>Base</i>	1,810	402	57	48	2,378

Type of employment contract

Table 15 suggests that:

- **Frequency of learning** – Respondents in permanent jobs were more likely to have engaged in multiple episodes of union learning than respondents on fixed-term or temporary contracts or those employed through an agency.
- **Type of learning** – There was not a great deal of difference in the types of learning undertaken between respondents in permanent jobs and those on fixed or temporary contracts, although respondents on fixed and temporary contracts were more likely to have participated in higher education and training to Level 4. Respondents employed through an agency were less likely to have participated in all forms of training apart from Functional skills and ESOL. Almost a quarter (23%) of agency workers had participated in ESOL, compared to just 4% of respondents who were in a permanent job.
- **Qualification** – Interestingly, a lower proportion of respondents on fixed-term or temporary contracts did not gain a qualification than those with other types of employment contract, and a greater proportion gained qualifications at a higher level than those they already held. It is not clear why this should be the case.
- **Motivation** – The proportion of respondents who were employed through an agency whose primary motivation for learning was either to perform better in their current job (38%) or to advance their career, gain promotion or a pay rise (22%) was higher than the averages for all respondents (27% and 13%, respectively).

Although the data suggest that those in permanent employment were more likely to have taken part in union learning, there is evidence that union learning has been highly effective in addressing the skills needs of workers on fixed-term or temporary contracts and those employed through an agency. More often motivated by the desire to perform better in their job or to advance their career or gain a pay rise, this group was more likely to have participated in multiple episodes of learning, to have participated in ESOL and to have gained qualifications at a higher level than those they already held.

Table 15: Type of employment contract by type of learning

	Fixed term or temporary contract	Employed through an Agency	In permanent job	All
Frequency of learning				
Once	43	48	36	36
Twice	18	22	18	18
Three times	10	11	14	13

Four to six times	9	5	12	11
More than six times	21	14	21	20
<i>Base</i>	<i>313</i>	<i>64</i>	<i>1,926</i>	<i>2,351</i>
Type of Learning				
Functional skills – English & Maths	26	33	23	24
ICT/Digital/Computing skills	28	22	28	28
ESOL – English as a Second or Other Language	10	23	4	5
Informal learning	27	22	26	26
Short course or event	45	23	43	42
Vocational course at a college or training provider	28	16	21	22
Higher education and training at Level 4	11	6	6	6
Training to be a union learning representative	29	9	30	29
None of the above	3	3	5	5
<i>Base</i>	<i>318</i>	<i>64</i>	<i>1,941</i>	<i>2,372</i>
Qualification level of last learning				
Higher qualification	40	29	24	26
Same or lower qualification	22	8	26	25
Not sure	10	23	13	13
No qualification	28	40	37	36
<i>Base</i>	<i>308</i>	<i>62</i>	<i>1,916</i>	<i>2,331</i>
Motivation for learning				
Perform better in my current job	29	38	27	27
Advance my career, gain promotion or pay rise	14	22	13	13
Gain skills that would be useful in my every-day life	27	15	24	24
Support people in my community or work place	22	13	26	25
Do something fun or meet people	2	2	3	3
Other	5	10	8	8
<i>Base</i>	<i>283</i>	<i>60</i>	<i>1,858</i>	<i>2,238</i>

Receipt of income-related state benefits or tax credits

The limited number of responses from learners who were in receipt of income-related benefits or tax credits makes analysis for this variable difficult. Nonetheless, Table 16 suggests that:

- **Frequency of learning** – A greater proportion of respondents who were in receipt of benefits (and those who prefer not to say) had only engaged in one episode of learning.
- **Type of learning** – Respondents who were in receipt of benefits were more likely to have undertaken learning in functional skills, ICT and ESOL and less likely to have undertaken training to become a Union Learning Representative.
- **Qualification** – There was little difference in the likelihood of achieving a qualification or a higher qualification between those receiving and not receiving state benefits.
- **Motivation** – Those in receipt of state benefits were slightly more likely to cite a desire to advance their career, gain promotion or a pay rise and slightly less likely to cite supporting people in their community or workplace as their main motivation.

Table 16: Receipt of income-related state benefits or tax credits by type of learning

	Receiving benefits	Not receiving benefits	Not sure/ prefer not to say	All
Frequency of learning				
Once	43	35	66	37
Twice	18	19	16	19
Three times	18	13	8	13
Four to six times	9	12	5	11
More than six times	12	22	6	20
<i>Base</i>	<i>197</i>	<i>2,132</i>	<i>142</i>	<i>2,471</i>
Type of Learning				
Functional skills – English & Maths	28	22	20	23
ICT/Digital/Computing skills	33	28	19	28
ESOL – English as a Second or Other Language	9	5	7	5
Informal learning	22	25	41	26
Short course or event	36	44	20	42
Vocational course at a college or training provider	22	23	12	22
Higher education and training at Level 4	5	6	2	6

Training to be a union learning representative	19	31	8	29
None of the above	4	5	4	5
<i>Base</i>	<i>197</i>	<i>2,150</i>	<i>143</i>	<i>2,490</i>
Qualification level of last learning				
Higher qualification	28	26	16	26
Same or lower qualification	23	26	11	24
Not sure	16	12	13	13
No qualification	33	36	60	37
<i>Base</i>	<i>193</i>	<i>2,116</i>	<i>142</i>	<i>2,451</i>
Motivation for learning				
Perform better in my current job	26	27	24	26
Advance my career, gain promotion or pay rise	17	12	20	13
Gain skills that would be useful in my every-day life	24	24	23	24
Support people in my community or work place	20	27	7	25
Do something fun or meet people	5	3	6	3
Other	8	8	21	8
<i>Base</i>	<i>186</i>	<i>2,034</i>	<i>140</i>	<i>2,360</i>

Highest qualification

As might be expected, the highest level of qualification held by respondents has a significant impact on both the nature of their learning and their motivation for learning.

Table 17 suggests that:

- Frequency of learning** – Respondents with higher level qualifications were more likely to have engaged in multiple episodes of learning. For example, 72% of respondents with no qualifications and 53% of respondents with Entry or Level 1 qualifications had only taken part in one union learning course, compared to 26% of respondents with a Level 4 and 29% of respondents with a Level 5 qualification. This finding is open to interpretation. On the one hand, it could be taken to imply that union learning, like other forms of learning, tends to be taken up by individuals who are already enthusiastic learners. On the other hand, it could be interpreted as a success, in that multiple episode learners may have attained higher level qualifications as a result of their union learning.
- Type of learning** – Unsurprisingly, respondents with low level qualifications were more likely to participate in learning focused on the acquisition of functional skills and ESOL; and were less likely to have participated in vocational courses at a college or training provider. Respondents with higher levels of qualifications were

more likely to have participated in higher education, short courses and events and training to become a ULR. The proportion of respondents who had participated in ICT and informal learning was similar across all qualification groups.

- **Qualification** – The proportion of respondents who did not gain a qualification as result of union learning was higher among learners with either very low or very high levels of qualification. Respondents with no qualifications are, by definition, unlikely to have gained a qualification through union learning, while those with Level 5 are more likely to have taken part in short courses and may be discounting elements of qualifications gained through union learning.
- **Motivation** – The proportion of learners stating that their primary motivation was to perform better in their current job or to advance their career, gain promotion or a pay rise is not clearly affected by the level of learners' qualifications. A higher proportion of learners with low levels of qualifications are motivated by desire to gain skills that would be useful in their everyday life, while those with higher levels of qualifications are more often motivated by the desire to support people in their community or work place.

Table 17: Highest qualification by type of learning

	None	Other	Entry & Level 1	Level 2	Level 3	Level 4	Level 5	ALL
Frequency of learning								
Once	72	26	53	36	34	26	29	37
Twice	17	22	20	21	17	13	16	18
Three times	5	12	12	16	13	15	13	13
Four to six times	2	12	6	11	13	16	12	11
More than six times	5	19	9	17	23	30	30	20
<i>Base</i>	170	435	203	540	492	220	410	2,470
Type of Learning								
Functional skills – English & Maths	14	9	53	33	23	23	11	23
ICT/Digital/Computing skills	25	20	28	37	28	32	22	28
ESOL – English as a Second or Other Language	13	7	16	3	3	2	2	5
Informal learning	32	22	20	24	25	30	32	26
Short course or event	14	48	18	37	47	54	55	42
Vocational course at a college or training provider	5	15	12	26	32	32	20	22
Higher education and training at Level 4	0	5	0	1	3	19	15	6
Training to be a union learning representative	8	27	12	28	29	43	40	29

None of the above	8	8	2	2	5	6	5	5
<i>Base</i>	170	436	207	551	494	222	411	2,491
Qualifications gained								
Higher qualification	14	9	43	39	31	33	12	26
Same or lower qualification	3	24	10	19	30	33	37	25
Not sure	14	15	17	17	11	7	5	13
No qualification	69	52	30	25	28	27	46	37
<i>Base</i>	168	435	195	540	490	217	408	2,453
Motivation for learning								
Perform better in my current job	19	29	34	24	24	28	28	26
Advance my career, gain promotion or pay rise	16	9	14	13	15	16	11	13
Gain skills that would be useful in my every-day life	32	20	27	30	23	22	18	24
Support people in my community or work place	8	29	12	25	28	27	31	25
Do something fun or meet people	6	4	4	3	3	2	3	3
Other	19	10	8	6	7	5	9	8
<i>Base</i>	165	428	186	496	474	213	402	2,364

Learner characteristics by learning type.

Table 18 and

Table 19 provide a profile of the demographic, employment and educational characteristics of respondents undertaking different types of learning. The analysis focuses on learners undertaking a single type of learning. Isolating, 'sole type' learners in this way, accentuates the differences between the groups. A number of interesting findings emerge from the data, although in general there are few surprises.

- Functional skills learners are more likely to be male (60%), from minority ethnic groups and with a first language other than English. They are likely to be employed full-time and to have low levels of existing qualifications.
- ESOL learners tend to be younger. The vast majority have a first language other than English, describe their ethnic origin as non-White British and have low levels of qualifications or qualifications from abroad.
- ICT learners tend to be older, are more likely to be male (58%) and slightly more likely to describe themselves as White British.
- Learners taking part in short courses and events are predominantly female (75%). They are older than average, more likely to identify themselves as being 'White

British', to have English as a first language, to be employed part-time and are generally highly qualified.

- Learners taking part in accredited vocational courses at college or training providers are slightly younger than average, are less likely to be employed full-time and are more likely to hold intermediate level (Level 2 or Level 3) qualifications, potentially gained as a result of union learning.
- Learners taking part in higher education are more likely to be female (65%). They tend to be younger and are more likely to be employed part-time. A large proportion (65%) hold qualifications at Level 4 or Level 5, though it is not clear if these were gained prior to or as a result of union learning. People who identify as 'White Other' are particularly likely to participate in higher education.
- Learners training to be a union learning representative tend to be older, more likely to describe themselves as White British, to have higher level qualifications and to be employed full-time.

Table 18: Learner characteristics by type of learning undertaken

	Functional	ICT	ESOL	Informal Learning	Short course	Vocational course	Higher education	Union learning rep.	All
Gender									
Male	60	58	53	42	25	53	35	54	44
Female	40	42	47	56	75	46	65	45	56
Prefer not to say	1	0	0	2	1	2	0	1	1
Age									
16 to 24	5	4	8	4	4	8	6	1	4
25 to 49	66	49	82	55	51	62	71	55	56
50 to 64	28	45	10	37	42	27	24	40	37
65 and over	1	1	0	1	1	2	0	1	1
Prefer not to say	1	2	0	3	1	2	0	3	2
Ethnic group									
Asian or Asian British	8	3	10	13	3	11	0	4	6
Black or Black British	9	8	6	6	2	2	0	4	5
White British	57	83	10	69	87	78	71	84	76
White Other	18	3	52	4	3	6	24	3	8
Other	5	3	22	5	3	2	0	2	4
Prefer not to say	3	1	0	3	2	1	6	4	2

English first language									
Yes	72	92	27	81	96	89	77	94	86
No	28	8	73	18	3	10	18	4	13
Prefer not to say	0	<1	0	1	1	2	6	1	1
Disability									
Yes	15	13	23	10	11	14	18	14	13
No	83	85	77	88	88	83	82	83	85
Prefer not to say	2	2	0	2	2	3	0	3	2
<i>Base</i>	<i>145</i>	<i>202</i>	<i>63</i>	<i>186</i>	<i>416</i>	<i>125</i>	<i>17</i>	<i>142</i>	<i>1,325</i>

Table 19: Employment & educational characteristics by type of learning

	Functional	ICT	ESOL	Informal Learning	Short course	Vocational course	Higher education	Union learning	All
Economic status									
Employed full time	85	80	76	66	66	62	65	81	72
Employed part time	12	13	14	23	26	24	35	16	20
Other economically active	0	4	5	2	3	8	0	1	3
Economically inactive	0	2	2	2	1	0	0	2	1
Prefer not to say	4	1	3	9	3	6	0	1	4
Highest qualification									
None	10	16	26	23	3	2	0	5	10
Other/overseas	7	16	31	16	26	11	29	26	20
Entry & Level 1	40	9	30	7	2	7	0	4	10
Level 2	27	29	3	21	15	31	0	18	21
Level 3	8	17	7	17	22	29	6	17	18
Level 4	2	6	2	4	9	7	24	6	7
Level 5	5	9	2	13	22	13	41	24	15
<i>Base</i>	<i>145</i>	<i>202</i>	<i>63</i>	<i>183</i>	<i>416</i>	<i>125</i>	<i>17</i>	<i>142</i>	<i>1,325</i>

Some of the complexity and nature of the relationships that exist between the learners' demographic characteristics and their learning choices, motivations and aspirations can be seen from the comments below, from older learners, female learners and learners whose first language is not English.

Older Learners

I'm 61 and all I wanted was to know how to use a computer. I can and have booked holidays, shop safely on line, email friends, family and anyone else I have to. I know how to protect my credit card details when shopping... I now get to see where I'm staying before I go and sometimes even take a peek of the area through google maps. I have to say thank to the learning people. I had a lap top and couldn't even switch it on. I can contact them and they help me whenever I want to learn something new. I am currently filing all my old photos on an external hard drive that I bought in the sales.

I will be 65 in March 2015 and am currently doing a level 3 Award in Education and Training with our local college so that I can help those who are entering the Trainee Programme to understand and apply basic numeracy. It's not just about me but more about what I can pass on.

Female / Male Learners

Gave me confidence returning to work after having children. Enabled me to network & gain experience.

I completed the Womens' Lives course in 2009 and it empowered, motivated me to continue to learn in various short and longer courses. Education has given me the opportunity to see that anything is possible if you believe and commit and practise. Education is the pathway that will give people knowledge, power, wisdom and choice and control over their lives.

I am very happy that somebody can give me chance to learn at workplace. I am a full time employee and father of two. I would not effort to pay my own money to do some courses as I am limited by the moneys (cannot effort expensive courses) and time (family life and job), but Usdaw is making big chance to change it. I am looking forward to get some courses to improve myself and in the same time improve family live as I am absolutely aware that knowledge and qualifications I will get are extremely important! So people like me who are willing to learn to achieve something in life and be much more satisfied this enormously fantastic and just to want to say BIG THANK YOU for it !!! Kind regards

Learners with ESOL

It give me a chance to learn of language, change jobs - a fair contract and consequently, on the resignation of benefits, and protection from exploitation and dishonesty. I have this hope.

I heard of union funding to contribute financially to my learning in higher education in the language school at Cardiff University (evening classes) through a Unite union rep... Recently I received my Diploma of Higher Education of which I am very proud. Without that support I would have found it difficult to pursue. Thanks to the Wulf (Wales Union Learning Fund project) I have continued with my studies and I am determined to continue with my education and I will strive to do so. My studies have become an important factor in my life with which I share with my wife children, friends, family and work colleagues alike. I am aware as an example it has inspired my work colleagues to take up college courses. I cannot thank the Wulf project and Unite union enough for their help.

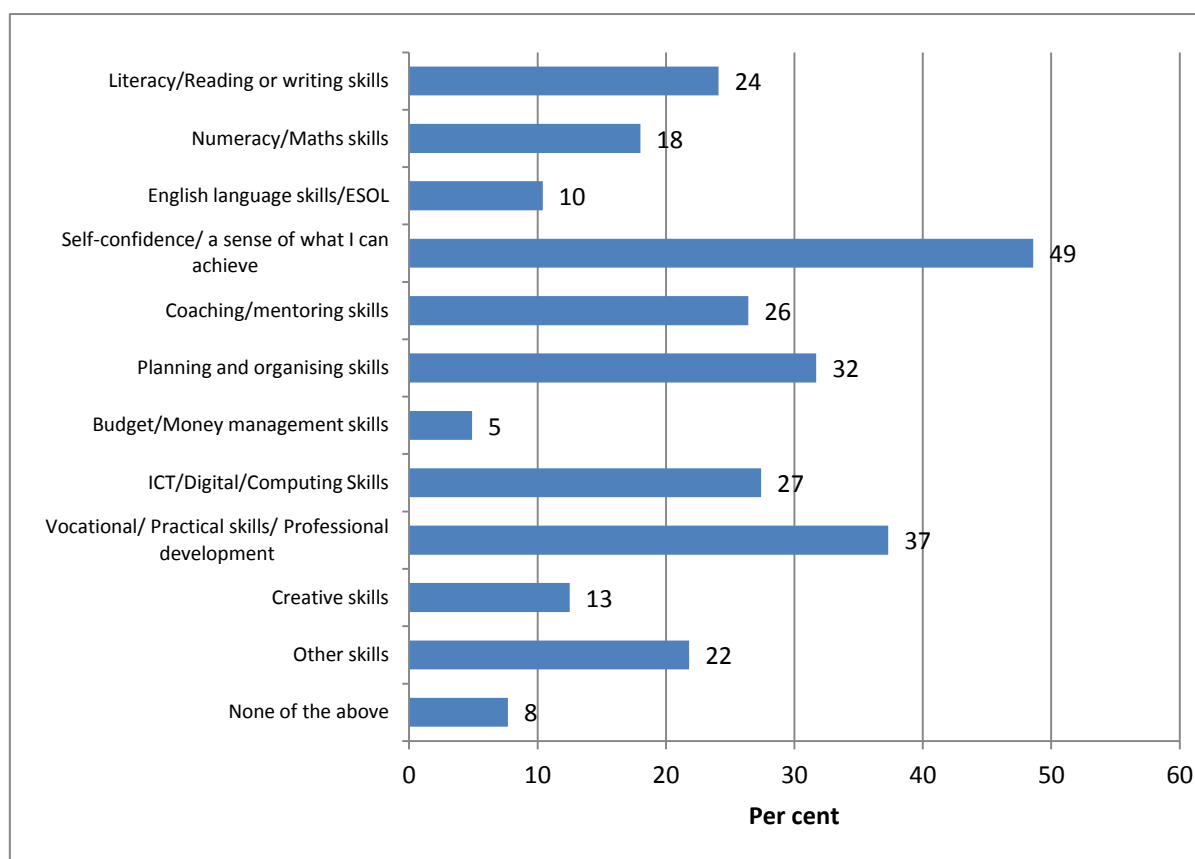
SKILLS GAINED & THEIR USE

This section looks at the skills gained by union learners and the uses to which these skills are put.

Skills development

Overall, 92% of respondents identified at least one skill that had improved as a result of their involvement in union learning. The skills most commonly gained were: self-confidence/sense of what I can achieve (mentioned by 49% of respondents); vocational/practical/professional development (37%); and planning and organising skills (32%).

Figure 7: Union learning has helped me to develop the following skills...



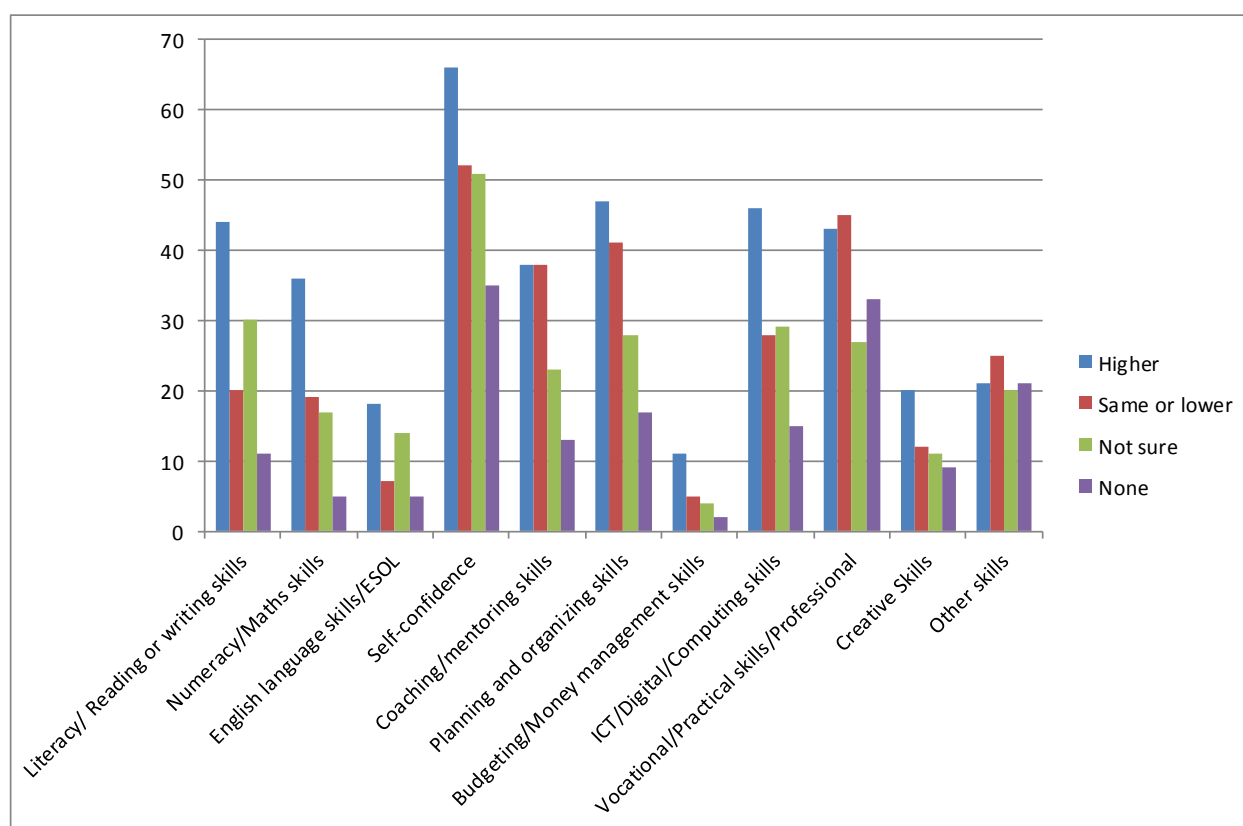
Base:2,492

Learners who gained a full or part qualification were more likely to report that they had developed skills than those who had not gained a qualification. This was particularly the case for learners who gained qualifications at a higher level than those they already held. These learners identified gaining an average of 3.9 different skills as a result of their participation in union learning, compared to 2.9 skills for those gaining qualifications at the same or at a lower level, 2.5 skills for those who were “not sure” if they had gained a qualification and 1.7 skills for those who had not gained a qualification.

Figure 8 shows the types of skills gained by respondents who gained qualifications at a higher level, the same level or a lower level than the qualifications they already held. It shows a complex relationship. The over-riding message, however, is that skills - such as ESOL, ICT, Literacy, Numeracy and Budgeting & Money Management skills²¹ - which are often the focus of specific programme training, are much more likely to be acquired by learners who gained a higher level of qualification than those who do not gain qualifications.

This is not to say that those who do not gain qualifications are not gaining skills. They are just as likely as those gaining higher qualifications to gain “other skills” and not much less likely than others to gain vocational/practical/professional skills. This is likely to be due to large numbers of participants seeing value in unaccredited short courses and events.

Figure 8: Skills gained by qualifications acquired (% of learners)



²¹ Often a focus of numeracy skills training.

Learners who completed courses were significantly more likely to have attained a range of skills than learners who left their programme of learning before it ended. On average, they identified having developed 1.9 skills each, compared to 1.2 for early leavers²².

Table 20 suggests that course completion was particularly important for developing self-confidence, vocational and practical and professional skills. Interestingly, the proportion of learners who felt they had acquired literacy / reading or writing skills; numeracy / maths, ESOL and ICT skills was not greatly affected by course completion, although it may be reasonable to assume that those who completed courses may have gained these skills in greater depth.

Table 20: Skills developed by course completion

	Yes, completed the course	No, I left before it ended	Not applicable, the programme lasted for one day or less	All
Literacy/ Reading or writing skills	20	18	8	17
Numeracy/Maths skills	11	11	2	9
English language skills/ESOL	10	7	5	9
Self-confidence	38	16	24	34
Coaching/mentoring skills	14	4	3	11
Planning and organising skills	18	11	6	15
Budgeting/Money management skills	3	6	1	2
ICT/Digital/Computing skills	23	18	13	20
Vocational/Practical skills/Professional	23	7	28	23
Creative Skills	8	6	8	7
Other skills	18	16	15	17
None of the above	10	36	30	16
Base	657	55	205	917

Unsurprisingly, the type of skills developed was closely linked to the type of learning undertaken. For example, respondents undertaking functional skills training either solely or in combination with other learning were more likely than others to report that they had developed their literacy/reading or writing skills.

Table 21 shows that certain skills, such as self-confidence, were acquired by a significant proportion of learners participating in all forms of learning. Vocational, practical or

²² This data is for learners who took part in a single type of learning and is not comparable to the data cited on the previous page.

professional skills were most commonly developed by participants in higher education (59% of whom developed these skills), short courses (51%) and vocational courses (42%).

Table 21: Skills developed by type of learning

	Functional	ICT	ESOL	Informal Learning	Short course	Vocational course	Higher education	Union learning rep.	All
Literacy/ Reading or writing skills	68	8	41	6	5	14	12	5	15
Numeracy/Maths skills	48	4	5	2	2	11	0	4	8
English language skills/ESOL	22	2	78	3	2	7	0	1	8
Self-confidence	35	28	24	36	35	54	41	47	36
Coaching/mentoring skills	10	7	3	5	14	23	18	30	13
Planning and organising skills	13	11	3	11	20	33	18	41	19
Budgeting/Money management skills	3	2	2	2	1	5	6	1	2
ICT/Digital/Computing skills	3	88	3	3	5	10	6	4	17
Vocational/Practical skills/Professional	8	6	5	23	51	42	59	20	28
Creative Skills	6	7	2	16	6	7	6	8	7
Other skills	8	7	5	29	22	22	12	24	19
None of the above	3	6	5	20	10	9	12	18	13
<i>Base</i>	<i>145</i>	<i>202</i>	<i>63</i>	<i>186</i>	<i>416</i>	<i>125</i>	<i>17</i>	<i>142</i>	<i>1422</i>

As we would expect, those types of learning that are focused on the acquisition of a specific skillset tend to produce concentrated skills outcomes. For example, of learners who only took part in ICT training 88% reported an improvement in their ICT/Digital/Computing skills, 28% a rise in self-confidence, but fewer than 10% reported the development of any other skill²³.

By contrast, participation in vocational courses leading to qualifications at level 2 or 3 is associated with the acquisition of a wide variety of skills, probably as a result of their having a greater breadth of focus.

Such differences in course specificity means that it is wrong to consider the volume of different skills acquired by learners participating in different types of learning as an outcome measure on its own. However, if there are types of learning that do not lead to the development of a particular skillset; which are less frequently identified as resulting in the acquisition of a variety of skills; and which are more often identified as leading to the

²³ It is notable that the skills developed by participants of Functional Skills, ICT and ESOL training are rarely regarded by learners as being vocational/practical/professional.

acquisition of none of the skills listed in Table 21²⁴, questions may be raised about their impact relative to other forms of training.

Table 22 shows, for each type of training:

- Whether the frequency with which respondents identify that they have developed any skill from their participation is higher or lower than the average (+/-10%) (frequency);
- Whether the two skills most frequently developed account for a higher or lower proportion of the all skills outcomes across all forms of training (+/-10%) (specificity);
- Whether the proportion of respondents who had developed none of the skills listed above is higher or lower than the average (+/-30%) for all forms of training.

On the basis of this analysis, Informal Learning would be flagged as being less clearly associated with skills acquisition than other forms of learning.

Table 22: Skills developed by type of learning, combined assessment

	Frequency	Specificity	None
Functional	High	Ave	Low
ICT	Ave	High	Low
ESOL	Ave	High	Low
Informal Learning	Low	Low	High
Short course	Ave	Ave	Ave
Vocational course	High	Low	Ave
Higher education	Ave	Ave	Ave
Union learning rep.	Ave	Low	High

This analysis is, however, somewhat simplistic. It is also based on responses by learners who had only participated in a single type of learning, while union learners frequently engage in multiple episodes of different types of learning.

Table 23 compares the skills gained by those who took part in a single learning episode to the skills gained by all respondents. It shows that learners who participate in multiple episodes of learning acquire a much greater range of skills than single episode learners. For example, while 15% of respondents who had participated in a single learning episode had developed their Literacy skills, 24% of all learners had improved these skills. This is likely to be due to learners combining different forms of learning.

Again, the data would appear to support an emphasis on fostering cultures of learning and to justify supporting multiple episodes of learning.

Table 23: Skills developed, single learning episodes v all learners

²⁴ The list includes an "Other" skills category.

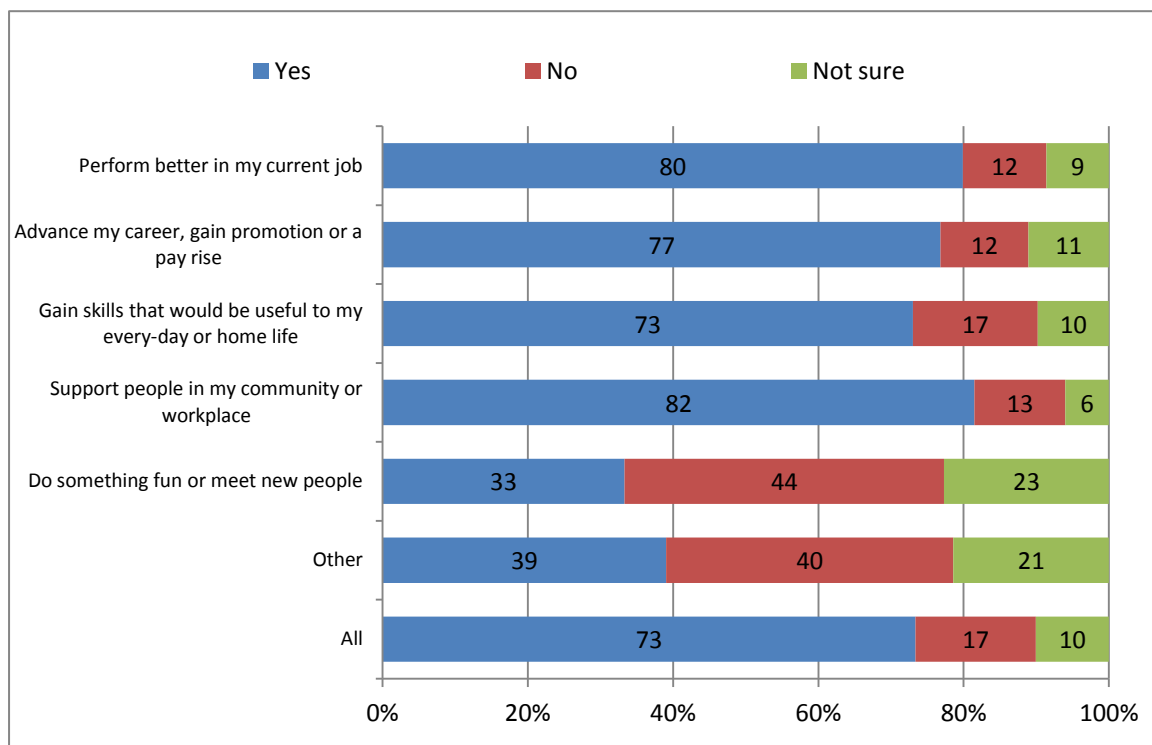
	Single learning episodes	All learners
Literacy/ Reading or writing skills	15	24
Numeracy/Maths skills	8	18
English language skills/ESOL	8	10
Self-confidence	36	49
Coaching/mentoring skills	13	26
Planning and organising skills	19	32
Budgeting/Money management skills	2	5
ICT/Digital/Computing skills	17	27
Vocational/Practical skills/Professional	28	37
Creative Skills	7	13
Other skills	19	22
None of the above	13	8

The application of skills to learners' current jobs

Nearly three quarters of respondents (74%) felt that union learning had given them new skills that they might use in their current job.

Figure 9 shows that, when matched against reason for undertaking learning, learners who had taken part in learning: to perform better in their current job (80%); to advance their career, gain promotion or a pay rise (77%); and, interestingly, to support people in their community or workplace (82%) were particularly likely to report that they had developed new skills they might use in their current job.

Figure 9: Motivation for training by has union learning given you any new skills that you might use in your current job?



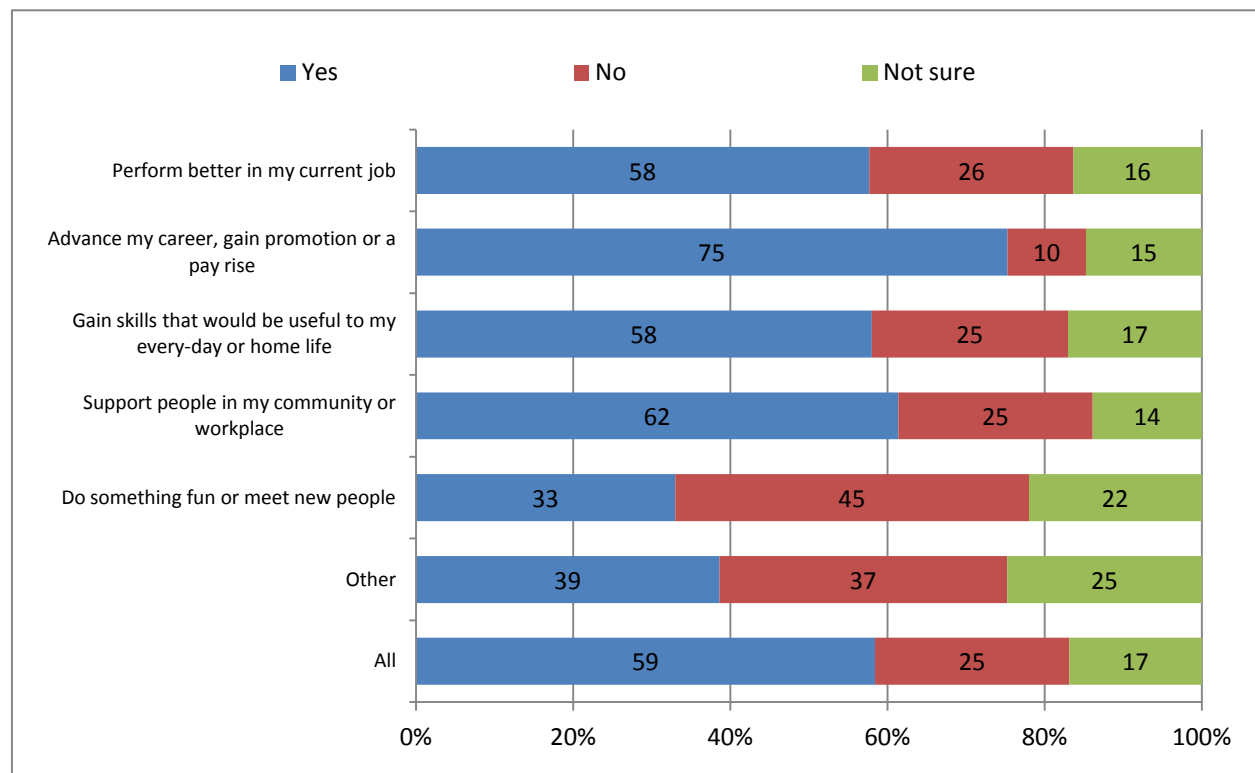
Base: 2375

Skills for new job or change into a different type of work

Almost two fifths of respondents (59%) felt that union learning had given them new skills that they might use to get a job or to change into a different type of work.

Unsurprisingly, respondents who had taken part in union learning to advance their career or to gain promotion or a pay rise were most likely to report that they had gained new skills that they might use to get a new job or to change into a different type of work. However, it is notable that almost 60% of learners who whose main motivation for taking part in learning was to perform better in their current job, to gain skills useful in their every-day and home life or to support people in their workplace or community, also stated that they had acquired skills that they might use to gain an new job or change into a different type of work.

Figure 10: Acquisition of new skills to get a job or to change into a different type of work by motivation for learning



Base: 2,371

Table 24 shows that although one episode of learning provides large number of respondents with skills that they might use in their current job and / or to get a new job or to change into a different career, the proportion of learners who report these outcome increases steadily with the number of learning episodes they have engaged in. This, again, points to the value of supporting multiple learning episodes.

Table 24: Use of skills by frequency of learning (%)

	Union learning given new skills you might use in your current job	Union learning given new skills you might use to get a new job or to change into a different career	Base
Once	61	48	930
Twice	76	60	457
Three times	81	60	325
Four to six times	80	65	275
More than six times	89	79	496
All	74	60	2,483

A wide variety of different types of learning were identified as having provided respondents with skills of use in their current jobs or for getting new jobs / changing careers. Functional skills, ICT, ESOL, vocational courses and higher education were particularly highly rated in these regards.

Interestingly, 70% of respondents taking part in short courses and events identified this learning as having provided skills they might use in their current job but a much smaller proportion (40%) identified these skills as being of use to get a new job or change career. The inference is that short courses and events are focused on immediate learning / skills needs and not generating portable qualifications. Training to be a Union Learning Representative was likewise identified as frequently providing skills for use in respondents' current jobs but less frequently providing skills that would help learners change or get new jobs.

Informal learning for leisure, pleasure or personal development is, unsurprisingly, least frequently identified with providing skills of use to respondents' current or future employment. This type of learning may, however, act as an entry point for vocational training and it is important to bear in mind that this data relates only to respondents who participated in a single type of learning.

Table 25: Use of skills by type of learning (%)

	Union learning given new skills you might use in your current job	Union learning given new skills you might use to get a new job or to change into a different career	Base
Functional skills – English & Maths	72	62	143
ICT/Digital/Computing skills	77	64	201
ESOL	85	76	61
Informal learning	32	30	184
Short course or event	70	40	415
Vocational course at a college or training provider	70	75	123
Higher education and training at Level 4	88	94	17
Training to be a union learning representative	64	44	142
None of the above	48	39	126
Single type of training only	64	50	1414

The comments below illustrate ways in which union learning has helped respondents to progress in their work and to change jobs and careers.

Union learning helped me move into a completely new career after 25 years working on the tools as a joiner on a construction site. It has changed my life.

I was facing redundancy and Unison were very supportive and helped me gain experience and confidence in new subjects I was interested in, this helped me find my current job in the NHS.

I'm very impressed with the courses available. Without a representative making me aware of available learning I wouldn't have completed my distance learning. As a result of my course, I feel, I have been offered a new job working within the field of my course. This has given me full time employment and taken me to the next banding level. Thanks so much. This service is invaluable and I am recommending it to all my colleagues.

I was able to gain a permanent contract after being an agency worker.

OUTCOMES OF LEARNING

In this section we look at the outcomes that result from union learning, distinguishing between:

- changes in circumstances that respondents identify as having “actually happened” on the basis of a binary “yes” / “no” response, referred to as “hard outcomes”; and
- changes in the capacity or disposition that respondents identify as having occurred to a greater or lesser extent using a sliding scale, from “completely agree” to “completely disagree”, referred to as “soft outcomes”.

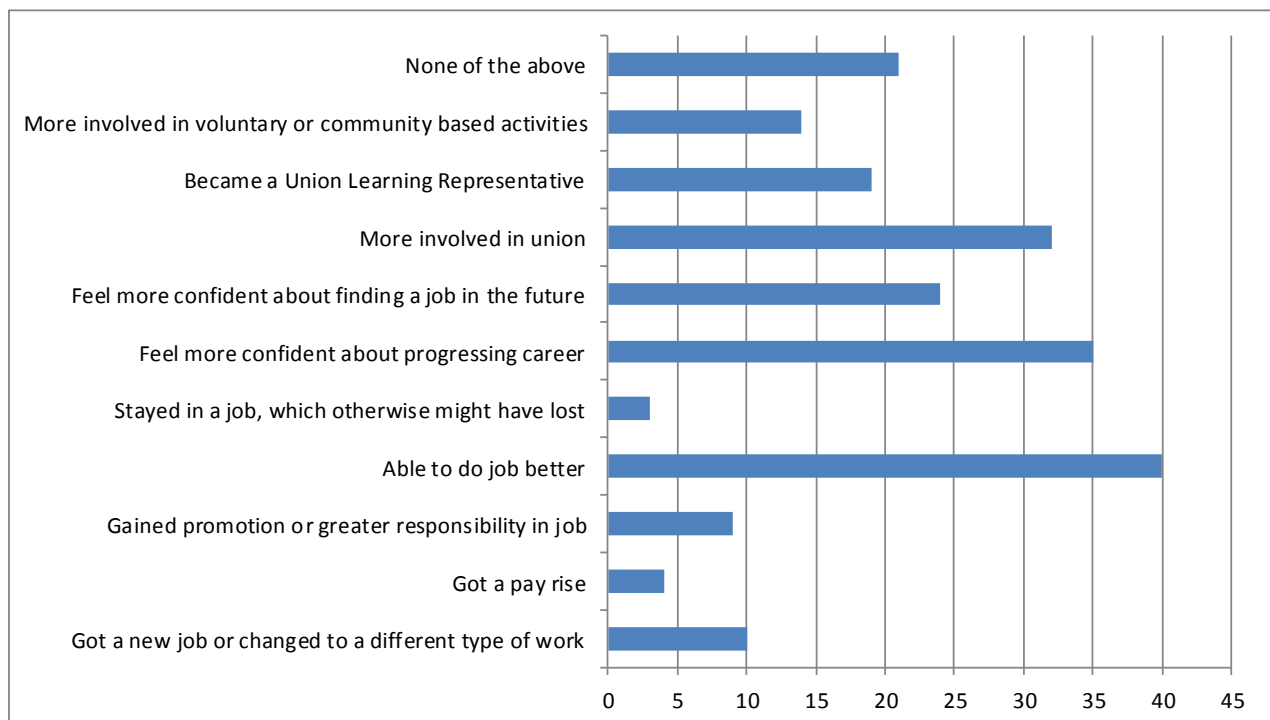
Hard outcomes

The most common hard outcome of participation in union learning is that participants are able to do their existing job better, cited by 40% of respondents. Large numbers of learners also felt more confident about progressing in their career (35%), became more involved in their union (32%), became more confident about funding a job in future (24%) and became a Union Learning Representative (19%).

Fewer respondents were able to identify that they had become more involved in voluntary or community based activities (14%), had got a new job or changed to a different type of work (10%), had gained promotion or greater responsibility in their job (9%) or gained a pay rise (4%) as a result of their union learning.

The significant gap between a) the proportion of respondents who felt they were performing better at work and the proportion who gained a pay rise and b) the proportion who felt more confident about progressing in their careers and the proportion who actually changed job or gained promotion, is interesting. This may be due to the amount of time that some outcomes take to come about. However, it seems also to suggest that a significant proportion of the benefit derived from union learning accrues to employers, at least in the short term.

Figure 11: Hard outcomes of union learning - Have any of the following things actually happened as a result of you participating in union learning?



Base = 2,434

The comments below are illustrative of these outcomes and how they impact on the lives of union learners.

I was able to do my job better...

I really enjoyed the day and my main motivation had been to “connect” with my professional colleagues to get a sense of how things were in the other NHS Trusts as I am currently going through major changes in my Trust. I felt reassured that there are still Trusts where good practice and core OT values/roles are protected but it was also useful to know that others shared similar experiences. The information on how to gain clinical evidence in day to day practice was inspiring.

I found the minute taking session very beneficial which has given me more confidence within my work. I really enjoyed it. As an employee with limited access to learning and development I found it really helpful. Thank you. :-)

I have found it extremely beneficial in improving the way I work and increasing my knowledge and understanding. It is difficult to get employers to agree to people attending training. However, as there is no direct cost in attending the Unison - Bridges to Learning events my employer has been supportive in me attending.

I got a new job or changed to a different type of work...

Union learning helped me move into a completely new career after 25 years working on the tools as a joiner on a construction site. It has changed my life.

I have gained employment after 4 years of being unemployed. It has changed my life and that of my daughter. She finally is going to get to go on an aeroplane on holiday.

I absolutely believe that I wouldn't have had the confidence to apply for jobs. Through gaining this and qualifications I now have a permanent full-time job. The first in 3 years.

Getting involved in union learning changed my life. From being a ULR I went on to become a Project worker for the area. I built an award winning learning centre in the workplace. My self-esteem "went through the roof". I left school with very few qualifications yet I have gained several in past 5 years thanks to union learning. I lost my job in May this year but, using the skills I'd learnt as a ULR and with a good portfolio of qualifications I got a job as a relief library assistant in September. I am now thinking about starting a uni course next year. Union learning has given me the confidence and motivation to reach for goals I thought were unobtainable.

I got Promotion...

I'm very impressed with the courses available. Without a representative making me aware of available learning I wouldn't have completed my distance learning. As a result of my course, I feel, I have been offered a new job working within the field of my course. This has given me full time employment and taken me to the next banding level. Thanks so much. This service is invaluable and I am recommending it to all my colleagues.

Union learning has completely changed my career. I had a degree and worked in an administrative job. Becoming involved in union learning and becoming a ULR has allowed me to get two promotions that my previous experience and qualifications would not have been applicable to. I now encourage members to participate in union learning for personal and professional development as it really can change their career, outlook and lives.

I would not be in the position I am now without it.

Over the past 21 years - I have been encouraged to apply and complete courses, including Return to Learn, Women, Work and Society and 1/2 day and full day on site courses. Without Unison, I really do think I would not have progressed in my job.

I became more involved in voluntary or community based activities...

Union learning is vital for those who received little or no qualifications at school. It has greatly built my

confidence and sense of self-worth. Union learning means that I now have an appetite to learn more. It has also helped me to play a greater role in serving my community e.g. Residents Association.

Unison training has given me confidence to support and manage members during grievances. I have now become a school convenor and have played a major role in setting up a school support network group.

I became more confident in finding a job in the future...

I feel more confident with looking for work. The help I was given with my CV was very useful and I now feel I have more direction.

The union have supported me through my redundancy and have shown me several ways of gaining future employment and training qualifications thus giving me a better understanding of my abilities and the union's willingness to help where and how they can.

I think it's brilliant, great opportunity to improve your skills, train for a better job and provides so many more opportunities.

I stayed in a job that I might have lost...

Fantastic help when I was under the threat of redundancy

I became more confident in progressing my career...

It has given me confidence and transferable skills enhancing my work prospects.

It has helped change my life also give me the confidence to go after my dream job.

I became more involved in my union...

Union learning has given me the confidence to become more politically active and able to encourage others to do so. I believe that unions, the ULF and unionlearn are extremely important conduits for working class people to become more educated and hopefully will continue to do so.

Bridges helped me to gain the confidence, qualifications and skills to support, encourage and promote learning opportunities to others. The learning opportunities it has provided from informal learning to vocational qualifications has helped learners to progress in their work roles as well as their personal

and social lives.

Thank you for raising staff learners' awareness of their right to secure work, holiday pay and other benefits. Thank you for raising awareness of how income inequality can be erased between uneducated, aggressive men and educated professional women. Thank you for helping those women facing discrimination... with professional development to learn skills that will help them to secure work to provide for their family. Thank you for stopping bullying and unfair, illegal practices at work, learning at home through education and union representation and action to right wrongs.

Hard outcomes by motivation for learning

Unsurprisingly, respondents' motivations for taking part in learning influence the outcomes they experience. Respondents whose main motivation was to:

- **advance their career, gain promotion or a pay rise** were most likely to state that they felt more confident about progressing in their career, finding a job in future or had gained a pay rise.
- **support people in their workplace or community** were most likely to state that they had become more involved in their union or had become a union learning representative.
- **do something fun or to meet new people** were most likely to have become involved in voluntary or community based activities.
- **perform better in their job** were most likely to state that union learning had enabled them to do their job better.

While some outcomes (e.g. becoming more involved in my union) were closely related to a particular motivation (the desire to support people in their workplace or community), other outcomes were experienced by learners with a wide variety of motivations. Being able to do their job better and feeling more confident about progressing in their career were reported as positive outcomes by large numbers of respondents whatever their motivation.

Table 26: Outcomes by motivation for participation

	Perform better in my current job	Advance career, gain promotion or pay rise	Gain skills that would be useful in every-day or home life	Support people in my community or workplace	Do something fun/meet new people	Other	All
Got a new job or changed to a different type of work	8	17	7	12	3	8	10
Got a pay rise	3	8	2	5	1	2	4
Gained promotion or greater responsibility in job	7	16	5	13	4	3	9
Able to do job better	55	35	35	42	13	16	40
Stayed in a job, which otherwise might have lost	4	2	3	4	0	1	3
Feel more confident about progressing career	33	51	33	37	26	16	35
Feel more confident about finding a job in the future	18	40	26	23	9	18	24
More involved in union	19	26	22	62	17	26	32
Became a Union Learning Representative	7	15	16	42	12	10	19
More involved in voluntary or community based activities	4	10	12	27	29	7	14
None of the above	20	18	27	9	40	45	21
Base	628	307	574	600	76	197	2382

Hard outcomes by type of learning

Table 27

shows the proportion of respondents reporting different outcomes by the type of learning undertaken. It is important to note that, in order to disaggregate the data, this table only relates to data for the 1,422 respondents who had taken part in a single episode of learning and, as previously stated, those who participated in multiple episodes and types of learning pointed to a much wider range of benefits as having resulted from their participation.

The table shows that respondents who took part in:

- Functional Skills learning, were more likely to feel confident about:
 - progressing in their career (38% citing this outcome, compared to 26% of all single episode learners); and
 - being able to do their job better (38%, compared to 31% of all learners).
- ICT, reported a wide range of outcomes. They were more likely than all learners to report feeling more confident about finding a job in the future (22% against 19%) and being able to do their job better (34% against 31%), but not by a large margin.
- ESOL, were significantly more likely to report that they had attained a wide range of outcomes than the average for all learners, including that they:
 - got a new job or changed to a different kind of work (21% citing this outcome, compared to 6% of all 'single episode' learners);
 - were able to do their job better (38%, compared to 31% of all learners);
 - stayed in a job that they might otherwise have lost (14%, compared to 2% of all learners);
 - felt more confident about progressing in their career (37%, compared to 26% of all learners); and
 - felt more confident about finding a job in the future (38%, compared to 19% of all learners).
- Informal learning, were less likely to report that they had attained any of the specified outcomes, apart from becoming more involved in community-based or voluntary activities (14% citing this outcome, compared to 7% of all learners). They were also significantly more likely to report that they had experienced none of the outcomes listed (53%, compared to 31%).
- Short courses, were:
 - the group of single episode learners most likely to report being able to do their job better (41%, compared to 31% of all learners); and
 - less likely than average to report any other single outcome.
- Vocational courses, were more likely than others to report outcomes relating to employment progression, such as that they:

- had gained promotion or greater responsibility in their job (7% citing this outcome, compared to 4% of all learners).
 - felt more confident about progressing in their career (38%, compared to 26% of all learners).
 - felt more confident about finding a job in the future (39%, compared to 19% of all learners).
- training to become a ULR, were much more likely than others to report that they had become more involved in their union (58%, compared to 19% of all learners) and had become a ULR (47% citing this outcome, compared to 7%). They were less likely to report other outcomes.
- Higher Education, were significantly more likely than others to report a wide range of outcomes, including that they: got a new job or changed to a different kind of work; gained promotion or greater responsibility; were better able to do their job better; felt more confident about progressing in their career; and became more involved in their union and became a Union Learning Representative.

While HE clearly confers a wide range of benefits, it is important to bear in mind that it takes much longer than many other forms of union learning, allowing time for different outcomes to come about or make themselves felt.

Table 27: Hard outcomes by type of learning, single learning episode

	Functional	ICT	ESOL	Informal Learning	Short course	Vocational course	Higher education	Union learning rep.	None of the above	All
Got a new job or changed to a different type of work	7	3	21	4	6	7	12	1	4	6
Got a pay rise	3	1	6	1	1	3	6	1	2	2
Gained promotion or greater responsibility in job	2	5	6	1	4	7	18	3	2	4
Able to do job better	38	34	38	15	41	33	59	16	18	31
Stayed in a job, which otherwise might have lost	3	3	14	0	1	3	0	1	2	2
Feel more confident about progressing career	38	26	37	14	27	38	65	18	19	26
Feel more confident about finding a job in the future	21	22	38	10	14	39	53	10	13	19
More involved in union	6	15	5	9	17	17	12	58	22	19
Became a Union Learning Representative	3	5	2	3	1	5	0	47	3	7
More involved in voluntary or community based activities	5	5	3	14	7	6	12	9	6	7

None of the above	18	32	13	53	32	17	12	14	52	31
Base	145	202	63	186	416	125	17	119	126	1422

The comments below illustrate the sorts of impact that different types of learning have on the lives of union learners.

Functional Skills, English & Maths

Bridges to learning helped me gain confidence. I never thought I would enrol onto a learning course but after enrolling on informal learning course I went on to do Maths, English and ICT and now have proper qualifications thanks to (NAME).

I was working towards level 1 English. I have dyslexia and (NAME) got me support in my course to help me. I couldn't finish because I got a job.

Although I have achieved CSE Grade 1 in Maths and English over 30 years ago, I have always lacked confidence in both, but have never had the opportunity to do any learning to improve these skills. The higher you go in Education (and work), you find coping strategies and get by but know you could be more effective if you could improve your numeracy and literacy skills. Unionlearn has given me this opportunity for which I am really grateful.

It has changed me as a person, I can now use figures.

ICT

As a complete novice on computers to learning how to do things I feel I am moving into a new generation being part of the "in crowd". Thanks.

I undertook the ICT level 1 course to brush up on some ICT basics. I'd learned what I already knew through a mixture of learning on the job, training courses and trial and error over the years, so it was good to go over the basics in a structured way. I was surprised that there were a few things I didn't know even after all the years I've been working with computers.

ESOL

I have enjoyed all the training and education I have received from Unite. I really hope we as unions can continue to obtain funding from government for the learning we all offer. In our country where the

English speaking courses are so important to aid people to integrate into our society.

It give me a chance to learn of language, change jobs - a fair contract and consequently, on the resignation of benefits, and protection from exploitation and dishonesty. I have this hope.

Informal learning

I did a short course on getting my car winter-ready. It was great fun and gives me practical skills being a single parent.

I really enjoy union learning, It gives me the opportunity to meet up with colleagues from other working areas. I enjoy the topics discussed which are always in a relaxed environment. I like being able to put my opinions across when discussing the topic of the day as the groups are always small and interact with each other well.

Short Courses

Very inspirational short courses that enhance my ability to perform my work well. Speakers always of an excellent calibre. Very intensive learning but both lectures and workshops well-structured and stimulate further study.

The amount of funding available to the employer [for training – ed.] has greatly reduced... this means that employers will select what education will be available with mandatory requirements met first, then only learning strictly necessary under the duty of care and to evidence practitioners' safe practice. RCN learning events cover subjects that are vital to nursing but not accessible through the employer. Topics recognised and needed by nurses, like NMC revalidation, emotional resilience, raising concerns safely, accountability/delegation, team working and leadership, alongside the clinical workshops of diabetes, parkinsons disease etc etc. Without the sponsorship and efforts of the RCN putting on these workshops there would be a very real deficit in learning support in the workplace.

I'm very grateful our union rep (NAME) organised our Autism training as it has given me greater knowledge of the condition which has enabled me to understand and support our pupils with much greater understanding and effectiveness.

Vocational Courses

Having completed The Apprenticeship in Team Leading has made me more confident to take up a Supervisor / Team Leader role.

Helped me as an apprentice

I think that union learning is a valuable resource to allow people to develop skills and progress their career. I certainly have gained lots of useful knowledge about SEN which I use on a daily basis at work as an LSA in a secondary school.

ULR

It has been very helpful in my career to help others and also made me more confident with speaking to big groups of people

Since becoming A Union Learning Rep, I have achieved things that I previously never thought I was capable of doing. I have the confidence to do whatever I want to do now.

Higher Education

Because of the help from the Union learning, I am now at University and doing quite well. They have installed confidence in me in that I can achieve my goals.

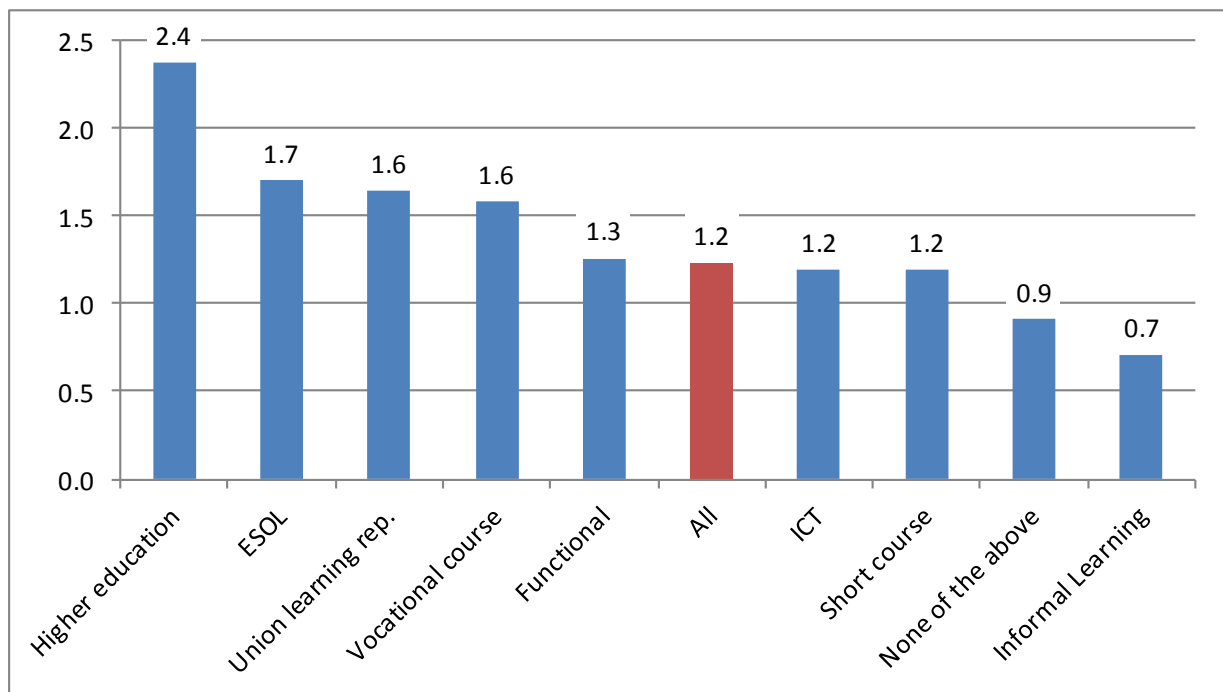
I would never have gone to University without Trade Union Education.

Union learning opened a new chapter in my life eventually giving me the confidence to undertake a degree, which I previously thought was way beyond my capabilities. I am extremely proud to say that I graduated with a 2:1 in September 2014. If it hadn't been for Union learning and the courses I was able to undertake in the run up to the degree I wouldn't be the confident person I am today.

Figure 12 shows that the average number of outcomes identified as having occurred as a result of learning varies by the type of learning undertaken. Respondents who participated in higher education attributed a larger number of outcomes to their learning than those who participated in short courses or informal learning. This might be expected, given the differences in the intensity and duration of these interventions.

The high volume of positive outcomes attributed to ESOL (1.7 per learner) and comparatively low volume attributed to informal learning (0.7 outcomes per learner) is notable. However, this data relates to the 38% of survey respondents who had participated in a type episode of learning and, as previously noted, some forms of learning may act as a gateway to others.

Figure 12: Ave number of outcomes per learner by type of learning



Learners participating in only one type of learning only

Hard outcomes by frequency of learning

Learners who engage in multiple episodes and types of learning attributed a much larger number of hard outcomes to their learning than single episode learners.

Figure 13 shows that, on average, learners who took part in three episodes identified twice as many outcomes as those who participated in one episode, while those who participated in seven or more episodes of learning identified three times as many.

Figure 13: Number of outcomes by number of episodes of learning

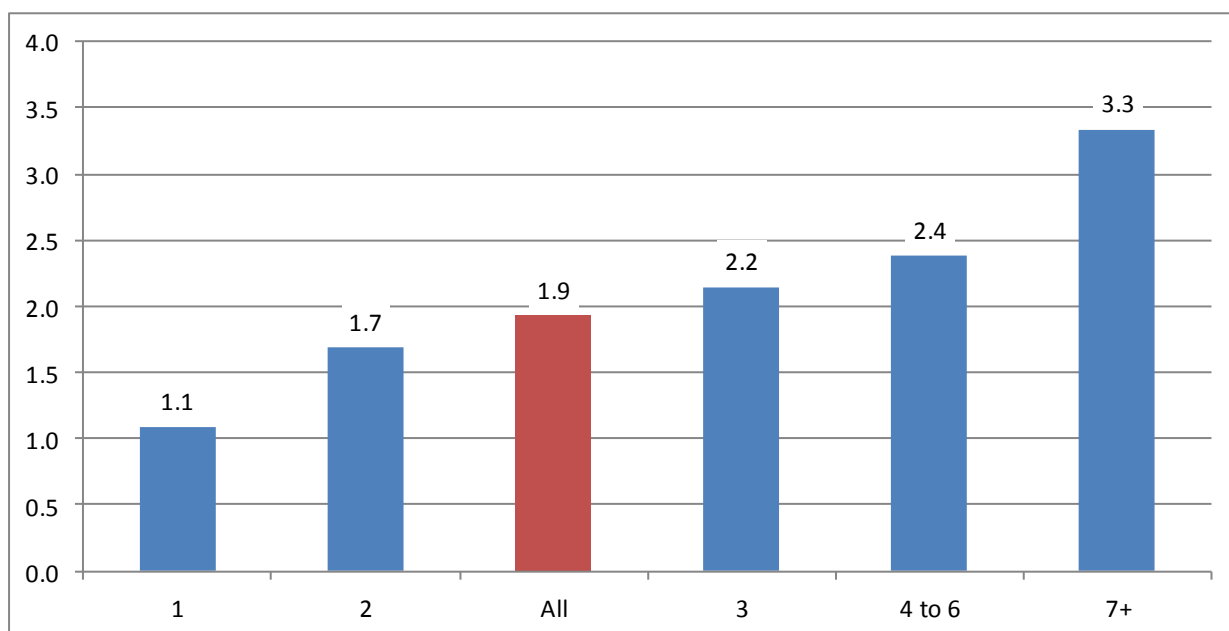


Table 28 shows how the proportion of learners citing each outcome is influenced by the number of learning episodes undertaken. It shows that, compared to respondents who had taken part in one episode of learning, those who had taken part in seven or more episodes were roughly:

- Four times as likely to report that they
 - got a new job or changed to a different type of job;
 - got a pay rise; or
 - gained promotion or greater responsibility in their current job.
- Twice as likely to report that they
 - were able to do their job better;
 - stayed in a job that they might otherwise have lost;
 - felt more confident about progressing in their career; and
 - felt more confident about finding a job in the future.
- Five to six times as likely to report that they
 - were more involved in their union;
 - had become a ULR;
 - were more involved in voluntary or community based activities.

Table 28: Individual outcomes by episodes of learning

	1	2	3	4-6	7+	All
Got a new job or changed to a different type of work	5	6	11	10	21	10
Got a pay rise	2	3	5	4	9	4
Gained promotion or greater responsibility in job	4	7	12	12	19	9
Able to do job better	28	36	45	49	61	41
Stayed in a job, which otherwise might have lost	3	4	3	3	6	3
Feel more confident about progressing career	25	38	37	40	50	36
Feel more confident about finding a job in the future	18	27	25	27	33	25
More involved in union	12	26	38	47	64	32
Became a Union Learning Representative	6	13	23	29	42	19
More involved in voluntary or community based activities	6	9	16	17	29	14
None of the above	35	20	12	11	6	21
Base	935	459	326	276	501	2,497

There may be a number of interpretations of this data.

Many people who become ULRs are inspired to take on the role as a result of their own positive experience of learning. We might therefore expect those who become ULRs and more involved in their union to have participated in multiple episodes of union learning.

Perhaps more interesting and impressive is the strong link between multiple episodes of learning and the likelihood of having gained promotion, greater responsibility in a job, a new or different type of job or a pay rise. While learners who engage in more episodes of learning are likely to have been in learning for longer, thereby allowing more time for these outcomes to occur, this does not in any way invalidate the result or the key conclusion to be drawn from the data, which is that the strong correlation between engagement in multiple episodes of learning and these outcomes appears to support a policy of encouraging people to engage in multiple episodes of learning.

Soft outcomes

Figure 14 shows the extent to which respondents agreed or disagreed that a range of soft outcomes have occurred as a result of their participation in union learning.

It shows that three quarter or more of all learners agreed or completely agreed that union learning has resulted in them becoming more confident in their abilities (82%); more likely to undertake further learning and training (79%) and more enthusiastic about learning (74%).

Two thirds (66%) agreed or completely agreed that they were better able to organise, mentor and support other people and half agreed or completely agreed that union learning had improved their quality of life and well-being (51%).

Figure 14: % of respondents who attained specified outcomes

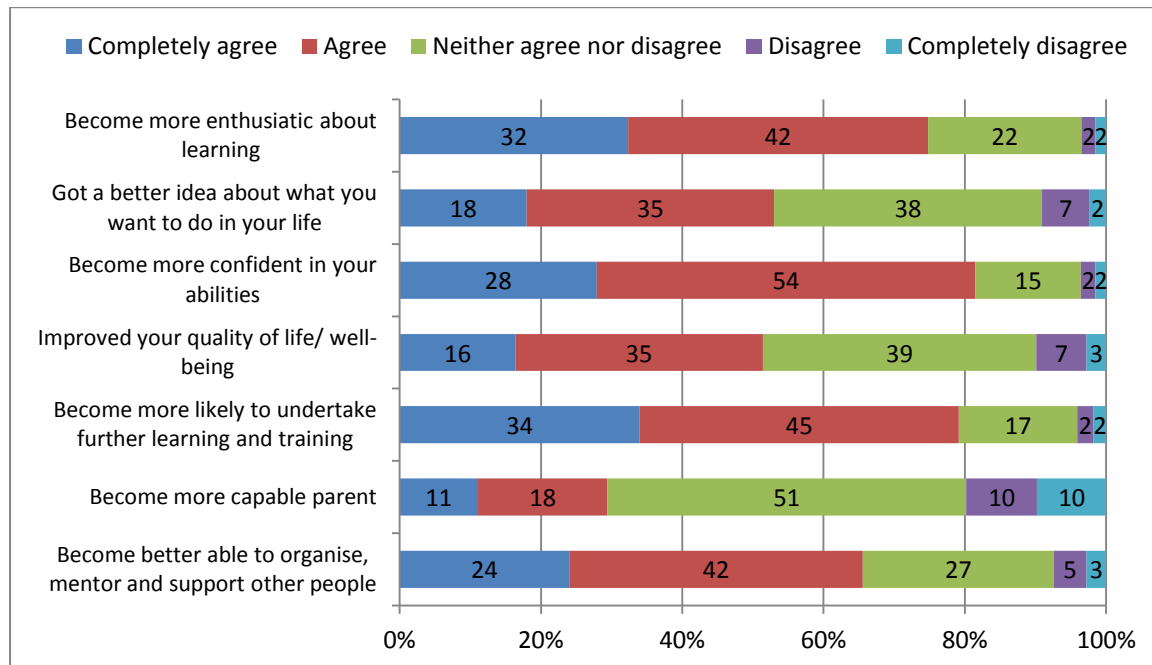


Table 29 looks at the proportion of participants in each type of learning who agreed that these outcomes applied to them. It shows that those who took part in:

- Functional Skills learning, were more likely than average to agree that they:
 - became more enthusiastic about learning (79% citing this outcome, compared to 75% of all respondents);
 - improved their quality of life / well-being (59%, compared to 51% of all learners);
 - became a more capable parent (47%, compared to 29%).
- ESOL, were more likely to agree that they had attained every single outcome. They were also the group most likely to agree that they:
 - became more enthusiastic about learning (89%, compared to 75%);
 - had a better idea about what they wanted to do in their lives (64%, compared to 53%);
 - improved their quality of life (79%, compared to 51%);
 - were more likely to undertake further learning and training (87%, compared to 79%); and

- had become a more capable parent (66%, compared to 29%)
 - felt more confident about progressing in their career (37%, compared to 26% of all learners); and
 - felt more confident about finding a job in the future (38%, compared to 19% of all learners).
- Vocational courses, were more likely to agree that they had a better idea about what they wanted to do with their lives (62%, compared to 53%); and most likely to agree that they had become more confident in their abilities (86%, compared to 82% of all learners).
 - Higher Education, were more likely to agree that they had a better idea about what they wanted to do with their lives (59%, compared to 53%). They were also most likely to agree were better able to organise, mentor and support other people (88%, compared to 66% of all learners).
 - Training to become a ULR were also more likely to agree that they were better able to organise, mentor and support other people (78%, compared to 66% of all learners).

The proportion of respondents who participated in ICT training, informal learning and short courses who agreed that they had experienced these outcomes was lower than the average for all forms of learning, for every outcome. This may be a function of the duration / quantity of these types of training. Nonetheless, by comparison, the proportion of respondents reporting positive outcomes as a result of training in ESOL is impressive.

Table 29: Soft outcomes by type of learning (% who agree that outcomes have occurred)

	Functional	ICT	ESOL	Informal Learning	Short course	Vocational course	Higher education	Union learning rep.	All
Become more enthusiastic about learning	79	74	89	55	59	79	59	68	75
Got a better idea about what you want to do in your life	55	41	64	49	35	62	59	44	53
Become more confident in your abilities	83	81	83	66	73	86	77	74	82
Improved your quality of life/well-being	59	38	79	37	36	50	47	34	51
Become more likely to undertake further learning and training	81	75	87	55	72	77	82	74	79
Become a more capable parent	47	29	66	17	14	29	29	14	29
Become better able to organise, mentor and support other people	53	48	71	37	54	69	88	78	66
<i>Base</i>	<i>141</i>	<i>199</i>	<i>58</i>	<i>185</i>	<i>414</i>	<i>122</i>	<i>17</i>	<i>140</i>	<i>2465</i>

The comments below are illustrative of these outcomes and how they impact on the lives of learners.

I became more enthusiastic about learning...

I don't think I would have got back into learning without the union

A very personal experience with excellent supportive tutors in an informal environment. Completely changed my mind about learning. Finally I now have had a positive experience and outlook towards adult education. Thank you.

I have had a very positive experience of union learning. I have gained in confidence and am now not so afraid of learning.

I got a better idea about what want to do with my life...

Union learning opportunities has changed the direction of (my) future career. I have gained and developed essential skills, confidence and highly improved my understanding of what I want to achieve in my career and my personal life. I am definitely a better and more productive employee than I was before I started learning with Union learn.

They have helped me build a new me.

I became more confident in my abilities...

I met people on the course who knew and understood the problems one faces when lacking confidence and how we allow others to make us feel so bad about ourselves that we doubt our own actions, how body language is read. I learned that I can be more assertive that there is more than one way to say no.

Because of the help from the Union learning, I am now at University and doing quite well. They have installed confidence in me in that I can achieve my goals.

A fantastic initiative that has enabled me and some of my colleagues to gain more confidence in our daily work. Hopefully the days of being confined to the scrap heap at age 16 are over. I would recommend union learn to everyone, at any level.

For me the most important part of union learning (as someone who did not reach their full potential at school through sheer terror and lack of self-confidence) is the secure and safe environment in which the learning takes place...

Union learning has helped my self-esteem & confidence & improved my skills in ways I never thought

possible.

Improved quality of life / well being...

Absolutely beneficial to my job and home-life. Without my ULR visiting the store I probably wouldn't have done anything.

Education through the Trade Union movement has fundamentally changed my life for the better. I feel indebted to the Union and those who came before me.

I can't stress enough how much the union learning does to better my life. I have learnt so much, and am a happier and more confident person because of it.

Union learn has enabled me to turn my working life around. Thank you for being there with your support and knowledge

It helped to boost my morale during a period of unemployment.

I became a more capable parent...

The GMB learning has totally changed my life from learning to read and write to help my children, then supported to progress from EL3 to L4.

I enjoyed doing all my classes as it helps me with my children's homework and keep up to date with an ever-changing world.

I became better able to organise, mentor and support other people...

Bridges helped me to gain the confidence, qualifications and skills to support, encourage and promote learning opportunities to others.

I have gained the confidence to start a community project in my area which is supported by the bakers union learning services which as at least 20 folk attending non accredited computer courses on a weekly basis. This has been achieved by us getting the support from union learning. I would like to take the opportunity to say a big thank you. Union learning changes people's lives.

It has helped me in my employment role also to recognise the training needs of other staff members

and to encourage others to learn more.

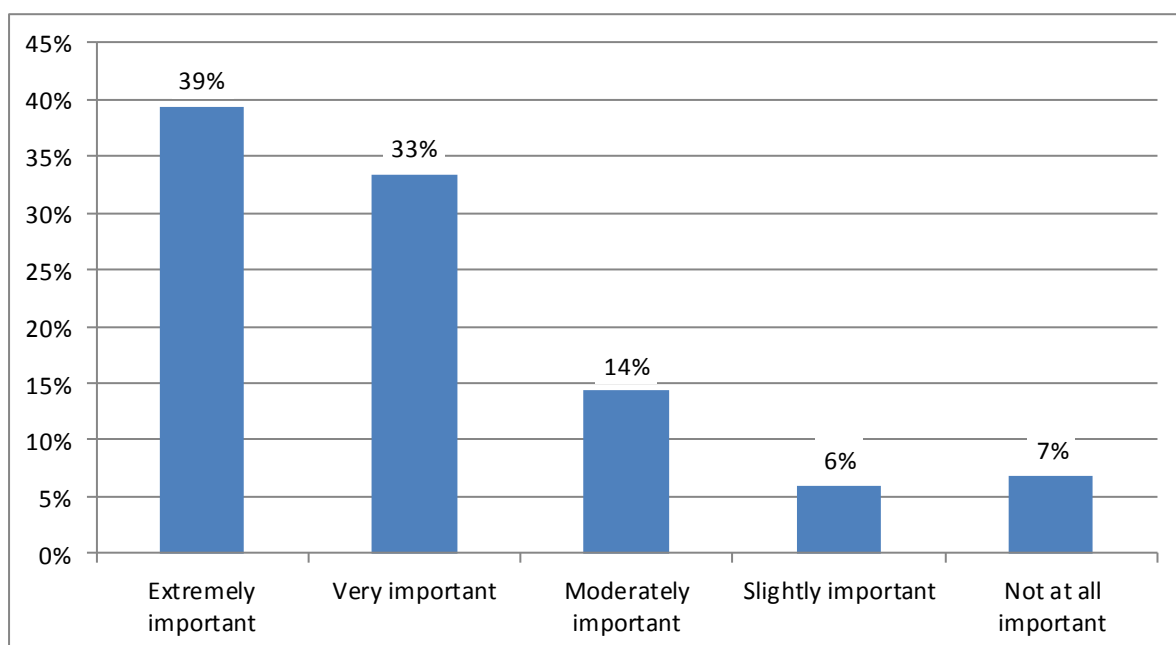
It's really rewarding being a ULR in my workplace. I have helped colleagues gain nearly 200 qualifications to date. It's inspiring to see people learn and mentor them through the process.

THE IMPORTANCE OF UNION SUPPORT

While respondents clearly experience a wide range of positive outcomes as a result of participating in union learning, how important do they consider their union to have been in supporting their learning? Would it have taken place anyway, without their union's involvement? This question of attribution is an important one, which needs to be taken into account when assessing the impact of the government's investment in the ULF.

Figure 15 shows that 72% of respondents felt that their union was either extremely important or very important in supporting their learning and that 13% thought it was only slightly or was not at all important to supporting their learning.

Figure 15: Importance of union in supporting respondents' learning



Base = 2,459

It is interesting to note that respondents in many minority or disadvantaged groups attributed a higher level of importance to the support received from their union than others.

The proportion of respondents who described their union as having been either extremely or very important to their learning was higher among people who:

- Identified as Asian or Asian British (82%), Black or Black British (85%), other ethnic minority (84%) and White Other (75%) than those who identified as White British (71%);
- Had English as a second or other language (83%) than those with English as a first language (71%);

- Had a disability (78%) than those who did not have a disability (72%);
- Had no qualifications (79%), qualifications at Entry level or Level 1 (83%) or at Level 2 (80%) than those with qualifications at Level 4 (72%) or Level 5 (63%);
- Were economically inactive (76%) than employed, either full-time (74%) or part-time (66%);
- Were claiming state benefits (78%) than those who were not (71%);
- Were male (78%) than female (68%).

This suggests that unions involved in the delivery of ULF have been successful in supporting people who often face disadvantages in the labour market or that the support they offer has been particularly appreciated by people in these groups.

The comments below are illustrative of the role that unions played in supporting respondents' learning.

Union learning has been the key which has helped people to regain those skills in literacy and numeracy which they have not used since they left school decades ago.

I wouldn't have taken any courses without the support of the Learning services.

For me the most important part of union learning (as someone who did not reach their full potential at school through sheer terror and lack of self confidence) is the secure and safe environment in which the learning takes place...

Union learning opened a new chapter in my life eventually giving me the confidence to undertake a degree, which I previously thought was way beyond my capabilities... If it hadn't been for Union learning and the courses I was able to undertake in the run up to the degree I wouldn't be the confident person I am today.

Our learning rep, (NAME), is fantastic. She has helped so many of us, her passion, motivation & support - amazing!

UCATT has helped me gain the necessary skills through their training and courses... They have helped my own education develop immensely and I cannot thank them enough for their support and help.

Without the union my days of further education would be over

BENCHMARKING OUTCOMES

To help us to consider the extent to which the outcomes of union learning might be considered “good”, or at least in line with expectations, we included a number of questions previously asked by the Community Learning Learner Survey (CLLS) (BIS 2013), an evaluation of programmes supported through the £210m BIS Community Learning budget.

Although such benchmarking is useful, it needs to be treated with caution. Differences in the questions asked²⁵, the context in which questions are asked²⁶ and the ways in which the surveys are conducted, all affect the results. The CLLS was a telephone survey with a randomised sample. The Union Learning Survey (ULS) was both postal and online, with self-selecting respondents. It could be argued that self-selection may pick up more engaged learners and those more likely to report positive experiences. Conversely, it could also be argued that respondents participating in an online / postal survey may feel freer to give honest / negative responses than those dealing with another person over the phone. The direction or extent of any possible bias arising from differences in approach is unclear.

It is, therefore, somewhat reassuring to find that the results of the two surveys are similar or that they differ in ways that might be expected, given the differences in the focus of learning under review.

Table 30 contains data on the proportion of ULS and CLLS respondents who felt that their learning had resulted in a variety of soft outcomes²⁷. It shows that a nearly identical proportion of respondents agreed that they:

- had become more enthusiastic about learning (75% for the ULS, compared to 76% for the CLLS);
- had a better idea about what they wanted to do in their lives (53%, compared to 51%);
- were more confident in their abilities (82% for both surveys); and
- were more likely to undertake further learning and training (79%, compared to 81%).

The one significant difference is that a higher proportion of CLLS respondents (71%) than ULS respondents (51%) agreed that their participation in learning had improved their quality of life. This is likely to be the result of union learning being work-related and primarily undertaken by those who are employed, while community learning is mainly undertaken by people who are economically inactive and includes a greater proportion of learning for leisure, pleasure, cultural enrichment and intellectual or creative stimulation.

²⁵ Community Learning Learner Survey respondents were asked to think about a specific course when answering questions, while Union Learning Survey respondents were asked to think about their union learning in general.

²⁶ Responses may be affected in subtle ways by preceding questions.

²⁷ The Union Learning Survey asked whether these outcomes had “actually happened as a result of you participating in union learning”, while the Community Learning Learner Survey asked whether they had “actually happened as a result of you doing the course”. Community Learning Learner Survey respondents are more likely therefore be attributing outcomes to a single recent episode of learning, while Union Learners are more likely to be attributing outcomes to all episodes of union learning.

Table 30: Benchmarked outcomes, life directions, Union Learning Survey v. Community Learning Survey

	Union Learning Survey	Community Learning Learner Survey
More enthusiastic about learning	75	76
Better idea about what you want to do in your life	53	51
More confident about your abilities	82	82
Improved your quality of life	51	71
More likely to undertake further learning and training	79	81

Turning to employment-related outcomes, shown in Table 31, the opposite pattern tends to emerge, with:

- a higher proportion of ULS respondents (42%) than employed²⁸ CLLS respondents (33%) stating that they were able to do their job better as a result of their learning;
- a higher proportion of employed ULS respondents (11%) than employed CLLS respondents (6%) stating that they had gained promotion, greater responsibility or got a pay rise.

The proportion of economically active ULS respondents who stated that their learning had given them new skills that they might use in their current job (82%) was also higher than the proportion of economically active CLLS respondents (61%) who stated that their learning gave them new skills they might use in a job, current or future. This is not unexpected as it reflects the vocational focus of union learning.

What is less expected is that a slightly higher proportion of CLLS than ULS respondents stated that they were more confident in progressing in their career (42% v 36%) or stayed in a job that they might have lost (5% v 3%) as a result of their learning.

Table 31: Benchmarked outcomes, work and employability, Union Learning Survey v. Community Learning Survey

	Union Learning Survey	Community Learning Learner Survey
Feel more confident in progressing in your career	36	42
Able to do your job better	42	33
Got a new job or changed to a different type of work	10	12
Stayed in a job which you might have lost	3	5
You got a pay rise, promotion or greater responsibility in your job	11	6

²⁸ CLLS respondents who were economically inactive or unemployed were not asked to answer these question

THE IMPACT OF LEARNING

There is a significant body of research that shows that investing in skills and learning has benefits for:

- **Society** through higher employment, a healthier population, greater civic participation and less crime;
- **Individuals** by raising their likelihood of being in employment, leading to improved wages, economic resilience and by contributing to their life-satisfaction;
- **Employers** who gain a more productive and innovative workforce and are better able to adapt to changing economic conditions; and
- **The economy** by increasing the productivity of the workforce and increasing employment rates (Campbell et al, 2010).

These impacts are inter-related. Raising skill levels raises salaries and employment levels. This reduces poverty, which in turn reduces illness, disease and unhealthy behaviours. The complexity and diversity of these relationships is such that building a holistic model of the impact of any single investment in skills is impossible. For this reason, our estimate of the impact of ULF Round 15, set out in the following section of this report, focuses solely on productivity, wages and employment. However, to come to any comprehensive assessment of the programme's impact, it remains important to consider and take some account of these broader impacts. This section therefore reviews the findings of a range of studies looking at the wider benefits of increasing participation in learning.

Social benefits of learning

One of the clearest benefits of education is health. People with higher levels of educational attainment have healthier habits and lifestyles (Healy et al, 2001). Holding higher levels of qualifications is associated with greater happiness, self-esteem, optimism, self-efficacy and a reduced risk of depression (Sabates et al, 2008; Government Office for Science, 2008). Participation in non-accredited learning as an adult is also positively correlated with taking exercise; with reductions in obesity (Feinstein, 2002 i) and is estimated to increase the chances of giving up smoking by age 42 by 14% (NIACE, 2010).

Adult learning also, in the words of David Cameron *"has a really important role to play in encouraging active citizenship"*²⁹. It is linked to raised racial tolerance (Feinstein et al, 2008); increased involvement in social, voluntary/community activities and political participation; and a greater likelihood of voting (NIACE, 2010). There is evidence of a relationship between learning and identification with social norms that inhibit criminal behaviour (Schuller, 2009) as well as with decreased risky behaviours, decreased teenage fertility and happier marriages (Oreopoulos & Salvares, 2011).

²⁹ Rt. Hon. David Cameron MP, quoted in *Adult Learning*, volume 20, number 9, May 2010.

Benefits to Individuals

UKCES has found “a wealth of evidence on the financial benefits of skills to individuals” and that “the possession and acquisition of skills and their quality has a direct relationship with an individual’s earning prospects, their likelihood of gaining employment, their job tenure and their propensity for future learning which helps to create the virtuous circle of learning and earning” (UKCES, 2010).

The economic impact of learning on individual earnings and employment has been the subject of a number of studies. These have looked at a variety of issues, such as how these impacts are affected by the type of qualifications gained (vocational / academic / apprenticeships); the level of qualification gained, the level of qualifications already held by learners; learners’ age, gender, ethnicity and so on.

A recent BIS study reviewed of this body of research (BIS / CE / IER, 2013) highlighting findings such as that:

- Individuals obtaining an NVQ2 as their new highest qualification earn around 4% more than individuals with no qualifications (McIntosh, 2009);
- An individual with an NVQ Level 2 held as a highest qualification and obtained through workplace learning earns approximately 10% more than an individual with no or lower level qualifications (ibid);
- At Level 3, all vocational qualifications are associated with positive returns when held as highest qualifications compared with a Level 2 qualification: ranging from 11% for an NVQ Level 3 up to 25% for an ONC/OND (ibid); and that
- Apprenticeships have particularly high levels of return, with those completing a Level 3 Apprenticeship earning a wage premium of 22% for men and 14% for women, relative to a comparison group with Level 2 qualifications (ibid);
- The highest employment returns are found for NVQ Level 3 (a 15% increase in probability of being employed) and NVQ Level 2 (11.8% increase compared to less than Level 2) (BIS / London Economics, 2011);
- Apprenticeships have the highest overall wage and employment returns at Level 3 (22% and 14%, respectively), although Level 2 apprenticeships also give rise to significant positive wage and employment returns (12% and 10%, respectively) (ibid);
- that higher levels of attainment are normally associated with higher returns, in terms of both wages and employment, although, conversely, lower level qualifications, including Level 1, are associated in relatively greater reductions in benefit usage (BIS / London Economics (2011ii).

Alongside these tangible impacts, education and training also benefits individuals in many subtle ways being associated, example, with patience, independence, long-term thinking, occupational prestige, self-accomplishment and inter-social interaction (Oreopoulos & Salvares, 2011). A recent study, which tried to quantify the value of these less tangible

impacts, found that adult part-time learning had a positive effect on people's life satisfaction that is equivalent to £1,584 of income per year and that, as adult learners undertake an average of two courses per year, the average life satisfaction "value" of a part-time course was therefore £754 (BIS, 2012).

Benefits to organisations

There is good evidence to show that learning not only benefits individuals and that, provided individuals' skills are effectively used, there are considerable benefits to employers.

It has been computed that raising the proportion of workers who are trained by 1 percentage point (from 10% to 11% for example) is associated with an increase in value added per worker of 0.6 %, and an increase in wages of about 0.3%. The inference is that the benefits of training accrue relatively equally to both employees and their employers (Dearden et al, 2005). This finding, that the total productivity gain from training is roughly double the wage gain experienced by individuals, is an important finding which is factored into our impact estimate in the next section.

Moreover, it is not only individual firms that benefit. Enterprises in areas of high skills and highly skilled employment benefit each other. Research by UKCES has suggested that a manufacturing firm located in an area where 40% of the population holds a Level 4 qualification can be nearly 14% more productive than one in an area where 30% hold a Level 4 qualification, due to taking on more efficient ways of working through informal learning, interactions and exchanges of information with peers (UKCES, 2010).

Benefits to the Economy

Research also suggests that lower workforce skills levels are a key factor of the productivity gap that exists between firms in the UK and their competitors in Europe and the U.S. and that countries with high levels of education and adult skills tend to become wealthier (UKCES, 2010).

It has been calculated, for example, that an extra year of education can lead to an average increase in steady-state output per capita by 4% to 7% (OECD, 2001) and that, in the European Union, an increase in the level of education across the existing labour force of one year could lead to an increase in productivity of 7% to 10% in the short term and 11% to 15% in the long term (UKCES, 2010).

ECONOMIC & FISCAL IMPACT

While it is important to bear the full range of social, health and other benefits of learning in mind, this section focuses on estimating the economic and fiscal impact of the ULF, derived from the effect of learning on individual wages, employment levels and productivity.

The methodology adopted to estimate the economic and fiscal impact of union learning is described in Annex 2. It has been reviewed by staff in BIS responsible for statistical modelling and is consistent with Treasury Green Book protocols.

In brief, it is based on research that demonstrates the extent to which raising individuals' skills and qualifications improves:

- individuals' earning;
- individuals' likelihood of being in work;
- employers' productivity.

Data on the returns to learning were applied to union learners who completed their courses and gained a qualification as a result of their learning. No benefit was assumed for early leavers or those taking part in unaccredited learning. No benefit was also assumed to flow from information, advice, guidance and referrals.

Earnings and employment premia³⁰ were applied to average wage estimates for people learning at different levels, over the expected duration of their working lives. This benefit was discounted at a rate of 3.5% per annum, to take account of the fact that the benefits of learning diminish with time, in line with Treasury Green Book guidance.

We have also estimated the deadweight (i.e. the proportion of learners who would have entered learning without ULF support) in order to isolate the value added by ULF Round 15. This was done by taking in account survey respondents' views on how important their union was in supporting their learning. And we have discounted the negative impact on productivity that results from taking time out of work to take part in learning.

³⁰ A percentage by which wages or the chances of being in employment are shown to rise as a result of gaining different types of qualifications when acquired as either a higher level of qualification than those already held or at the same or a lower level than qualifications already held by learners.

Estimated total impact

Based on this approach, we estimate that the overall impact of ULF Round 15 amounts to around £916 million.

The total benefits to individuals are estimated to be £580 million, comprised of £470 million from higher wages and £110 million of improved earning as a result of being more likely to be in employment.

The net benefit to employers resulting from the increased improved productivity of a better skilled workforce less output lost as a result of working time lost to engage in learning is estimated at £336 million.

Return on investment

As the ULF primarily funds brokerage activities, it is important to add the cost of delivering the learning to the £14.15m ULF investment when estimating return on investment.

The application of these unit costs to the cohort of ULF results in an overall delivery cost of £100 million, made up of £86 million in training costs and £14.15m of brokerage / ULF costs. Information on how delivery costs are calculated is provided in Annex 2.

On this basis, we estimate that £1 invested in the Union Learning Fund generates a total economic return of £9.15, of which £5.75 accrues to individuals and £3.40 to employers.

Return by type of provision

The data we have also allows us to estimate the return on investment (RoI) generated by different types of learning. However, considerable caution is needed in interpreting these results for a number of reasons, particularly because a) RoI is assumed to flow solely from the acquisition of qualifications and b) the proportion of learners gaining qualifications is derived from data for learners who have undertaken one episode learning. Those types of provision that are largely unaccredited (such as informal learning, short courses and events) or which are accredited through multiple episodes (such as CPD events) appear to generate low levels of return on investment. In reality, as we have previously noted, the majority of union learners take part in multiple episodes of learning, combining different forms of provision.

Nonetheless, in broad terms, the data suggests that participation in Apprenticeships, accredited FE programmes and the acquisition of vocational qualifications at work show a high level of return on investment. The returns on ICT and English, Maths and functional skills are also substantial, but not as high as those shown for vocational skills. This is consistent with wider research findings, which show returns to the acquisition of vocational skills, particularly at Level 3 and above, exceeding those for foundation learning.

It is interesting to note that the costs of investment in higher education and informal learning are shown to be negative. The reasons for this vary. Informal learning is rarely accredited and therefore, within the model, largely attributed a 'nil' economic value, which may be unfair. For higher education, the collective cost of tuition fees, lost earnings and productivity foregone are estimated to be higher than the nonetheless significant (c. 11%) uplift in earnings generated through the acquisition of graduate level qualifications. Such a finding might be a surprise. However, it is important to bear in mind that the average age of union learners taking part in higher education is estimated to be 41, which significantly reduces the period over which the benefits of increased wages are felt³¹.

Table 32: Return on investment (£) by type of learning

Type of Learning	Estimated RoI (£)
Apprenticeships	16
FE Programmes & Vocational Quals	13
ICT	12
Functional Skills, English & Maths	8
Training to be a ULR	3
Short Courses & CPD	1
Higher Education	-0.8
Informal Learning	-0.9

Returns to the Exchequer

The Exchequer benefits from learning in many ways, including through the positive impacts on health, reduced crime and increased civic participation explored in the previous chapter. It also benefits from reduced welfare payments, due to individuals being more likely to be in employment, and from reduced dependency on in-work benefits, as a result of increased wages. While these benefits are clearly important, they are impossible to model with any reliability and are therefore discounted from our calculations.

These focus on the following estimable benefits:

1. Income Tax on increased individual earnings;
2. National Insurance contributions on increased individual earnings;
3. Increased VAT receipts on consumption resulting from raised incomes;
4. Higher employer National Insurance contributions on employee wages.

A limited model, focused solely on increases in these tax receipts suggests that the fiscal return to the Exchequer from learning generated by ULF Round 15 amounts to £250m.

³¹ Returns to individuals' investment in higher education (in the form of loans) may be positive (and particularly positive for younger people), as this calculation includes an estimation of lost earnings and productivity foregone.

Taking into account the both the cost of ULF Round 15 and the cost to partners of delivering ULF generated learning (£100m), the estimated return to the Exchequer is £2.50 for each £1 spent. Clearly this comfortably exceeds the scale of the initial Exchequer investment.

ANNEX 1 – OVERVIEW OF PROJECT OUTPUTS

	Training for ULRs	Functional Skills		ICT	Vocational Quals		Other Learning Opportunities					Supporting Learners	
		English	Maths		Level 2	Level 3	IACL	CPD	FE	HE	Apprentice- ships	IAG via ULRs	Learner Support Referrals
BFAWU	0	160	82	331	39	7	394	666	1	1	48	2,052	1,706
CWU	22	202	238	1,641	190	0	3,058	375	212	7	98	3,277	169
GMB (Y&D)	24	758	270	7,399	482	115	1,794	49	874	0	118	226	37
GMB (South)	20	207	65	770	125	53	185	123	327	6	99	2,164	312
PCS	29	208	233	538	173	155	808	93	32	18	352	4,730	265
RCN	127	0	0	90	0	0	0	3,074	0	2	153	2,931	0
UCATT	10	332	397	572	315	58	1,637	579	2,367	18	660	8,987	2,138
UNISON (North)	27	128	172	78	427	196	524	1,166	0	121	63	5,542	615
UNISON (nat)	308	219	160	518	289	1	3,221	762	2,248	22	468	38,148	244
UNITE	414	2,917	2,544	5,773	2,740	521	5,994	7,346	10,838	184	2,070	15,632	4,638
USDAW	233	1,508	990	2,329	445	25	2,076	749	1,402	20	582	6,445	1,818
Participating projects	1,214	6,639	5,151	20,039	5,225	1,131	19,691	14,982	18,301	399	4,711	90,134	11,942

ANNEX 2 - IMPACT ESTIMATE METHODOLOGY

Earnings and employment premia

The impact estimates presented in this report are based on a model developed in 2011 for BIS by Cambridge Econometrics (CE) and the Institute for Employment Research (IER) (Beaven et al, 2011) as a basis for estimating the impact of the Further Education. This work in turn draws on research (including research cited in the previous section, such as McIntosh, 2010; BIS / London Economics, 2011i; BIS / London Economics, 2011i; and Dearden et al, 2005) to generate estimates for the uplift in earnings that individuals experience a) from higher wages and b) from the increased likelihood of being in employment resulting from the acquisition of qualifications; and the impact of raised skills levels on productivity.

The model created by Beaven et al provides estimates of the wage and employment premia for different levels of qualifications, acquired through different types of learning, by learners acquiring qualifications at a higher level and at the same or a lower level than the qualifications they already hold. These are shown in Table 33 and

Table 34.

Table 33: Wage premia adopted in the model (%)

Provision Type	Previous Highest Qualification				
	None	L1	L2	L3	L4 & L5
Apprenticeship L2	16	16	16	4	4
Work Based NVQ L2	9	9	4.5	2.25	2.25
Provider Based NVQ L2	4	2	1	0.5	0.5
Apprenticeship L3	18	18	18	9	4.5
Work Based NVQ L3	15	15	15	7.5	3.75
Provider Based NVQ L3	11	11	11	5.5	2.75
Basic Skills	3	5	5	5	5
Developmental Learning*	3	5	5	1.25	1.25

Source: Cambridge Econometrics / Institute of Employment Research in Beaven et al, BIS 2011

* Includes qualifications below Level 2, excluding basic skills.

Table 34: Employment premia adopted in the model (%)

Provision Type	Previous Highest Qualification		
	L1 & below	L2	L3 & above
Apprenticeship L2	2.7	0.7	0.7
Work Based NVQ L2	2.7	0.7	0.7
Provider Based NVQ L2	5.4	1.4	1.4
Apprenticeship L3	3.8	1.05	0.3
Work Based NVQ L3	3.8	1.05	0.3
Provider Based NVQ L3	7.7	2.1	0.5
Basic Skills	1.4	0.3	0.3
Developmental Learning	1.4	0.3	0.3

Source: Cambridge Econometrics / Institute of Employment Research in Beaven et al, BIS 2011

Before deciding to use the premia shown above, we reviewed subsequent research on the Returns to Intermediate & Low Level Qualifications (Conlon et al, 2011), which is used as a basis for the Treasury approved Unit Costs Database developed by New Economy in partnership with the What Works centre for Local Economic Growth. Our decision to use these was based on the fact the subsequent work did not include premia for Basic Skills or Developmental learning, an important focus for the ULF. Nor did they differentiate between the premia for those acquiring qualifications at a higher level than the qualifications they already held and those acquiring qualifications at the same or a lower level.

Comparison between the two studies suggests we have may have used the more conservative estimates, though this will depend on the precise type of Level 2 and Level 3 qualifications being gained, which is examined by Conlon et al. For example:

- Conlon et al estimate the earnings uplift generated by the acquisition of Level 2 qualifications at 12% for a BTEC L2, 7% for a C&G Level 2, 4.5% for a provider based L2 and 3% for a work based L2. Our model is based on the assumption of an uplift of 4.5% for those gaining qualifications at a higher level than those held and 2.25% for those acquiring qualification at the same or at a lower level.
- Conlon et al estimate the earning uplift estimates generated by the acquisition of Level 3 qualifications at 20% for a BTEC L3, 15% for a C&G Level 3 and 10% for an NVQ. Our model is based on the assumption of a 15% for those gaining qualifications at a higher level than those already held and 7.5% for those gaining qualifications at the same or a lower level.

Data on the proportion of union learners gaining qualifications at a higher level or at the same / a lower level than the qualifications they already held was drawn from our survey. Learners who gained a qualification but were unsure of its level were attributed equally to those attaining qualifications at a higher level and at the same or lower level than the qualifications they already held.

Application of earning and employment premia

In our model, we only applied these premia to:

- ULF learners who completed their programme of learning. This ranged from 90% of those undertaking vocational learning in FE to 60% of those on CPD programmes.
- ULF learners who gained qualifications as a result of participating in learning. The proportion of learners gaining qualifications was calculated by isolating learners who took part in a single episode of each type of union learning, which ranged from 80% of learners undertaking vocational learning to just 9% of those engaged in informal learning for pleasure, leisure and personal development.

Although they clearly derive some benefit, those who did not complete their course or who did not gain a qualification as a result of their learning were discounted from the impact model.

To create the model, it was necessary to match data on the actual number of ULF learners who undertook each type of learning, taken from projects final submissions in April 2015, to the categories used in the model developed by Beaven et al. For some forms of union learning³² this was unproblematic. For others, assumptions needed to be made. For example, in the absence of information about the qualifications being pursued by union learners participating in “FE Programmes”³³, we attributed these to Level 1, Level 2 or Level 3 learning in line with the national distribution of all FE learning across these levels. Similarly, ULF brokered Apprenticeships were attributed to Level 2 (Intermediate) and Level 3 (Advanced) Apprenticeships in line with the proportion of all Apprenticeships delivered at these levels nationally.

Although we already exclude those who do not gain qualifications, we were conscious that union learners participating in CPD and informal learning may only acquire a small number of units or credits towards qualifications. Although other models do not differentiate between the sizes of qualifications gained by learners (i.e. whether these were Awards, Certificates and Diplomas), to err on the side of caution we have assumed that qualifications acquired through these two forms of learning confers only 20% of the benefit and premia set out in Beaven et al.

In line with Green Book methodology, we have allowed for the fact that benefits of learning diminish over time by discounting all premia at a rate of 3.5% per annum³⁴ for the duration that learners remain in the labour market. The average age of learners was calculated from data generated by our survey. For the purposes of the model, we have assumed that all learners (male and female) remain in the labour market until the age of 65.

³² Matching Maths, English, Functional Skills, ICT courses at Levels 1, 2 and 3; Vocational Qualifications at Level 2 & Level 3 was straightforward.

³³ These were also assumed to be provider based, while ‘Vocational Qualifications’ at Level 2 and 3 were assumed to be workplace based.

³⁴ This approach is in line with Green Book methodology, which applies a discount rate of 3.5% p.a. for the first thirty years.

Average salary data for each group of learners (ranging from £14,590 for Functional Skills, English and Maths learners to £20,738 for those on HE programmes) was taken from ONS data on the median salary for UK workers holding different levels of qualification.

Estimating added value

As ULF is primarily a brokerage activity, focused on encouraging people to take up learning opportunities, it was important to recognise that some of this learning would have taken place without ULF/ULR support. To derive an estimate of the value added through the ULF and the counter-factual (i.e. the proportion of learners who would have participated in learning without the support of their union), we used the scale shown in Table 35, working on the assumption that 80% of learners who said that their union had been 'Slightly important' to their learning would have participated in learning without union support, compared to just 20% of those who said that their union had been 'Extremely important'. This approach results in an estimate that 64% of the English, Maths and Functional skills learning was attributable to the ULF support, compared to 49% of Higher Education and 46% of CPD.

Table 35: Proportion of learners who would have participated in learning without support from their ULF project.

How important has your union been in supporting your learning?	Probability of learning without ULF Support
Extremely important	20%
Very important	40%
Moderately important	60%
Slightly important	80%
Not at all important	100%

As these assumptions about the value added have a considerable impact on the overall estimate of the economic impact of ULF, they are subjected to a sensitivity analysis, described below.

Return on investment

In order to estimate the Return on ULF investment, we calculated the cost of delivering the learning that results from ULF funded brokerage activities to the £14.15m investment in the ULF.

The following methods / sources were used to estimate the cost to government of delivering each type of learning.

- **Functional Skills, Level 2, Level 3 vocational qualifications & FE Programmes**

In the absence of data on the proportion of union learners studying for Awards (1 to 12 credits), Certificates (13 to 36 credits) or Diplomas (37 to 370), we assumed that this would be in line with the overall proportion of adults studying for each of these

sized qualifications. Data on this was drawn from the Skills Funding Agency (SFA) data cube. An average cost for an Award, Certificate and Diploma was then calculated using data drawn from SFA Simplified Funding Rates database for 2014/15. As funding rates vary from sector to sector, we derived an average cost per qualification at each level and size and used this as a basis for producing a weighted average cost (adjusted for the proportion of learners likely to be studying for Awards, Diplomas and Certificates) for each level of qualification.

- **ICT Learning**

We used a similar approach to that described, although this was simplified by the fact that there is no variation in funding rate by sector. As the focus is on ICT User qualifications (as opposed to ICT for professionals) an assumption was made that those studying at Level 1 were divided equally between those studying for an Award and a Certificate, while all those studying at Level 2 or Level 3 are studying for Certificates. The specific SFA funding rate for Online Basics was used for that course.

- **Training to be a ULR**

SFA funding rates are available for ULR training. The cost of Stage 1 ULR Training is based on the SFA Funding values for the Certificate for Trade Union Representatives. Stage 2 is based on average values of a range of Certificates and Diplomas, e.g. in employment law, organising and recruiting etc.

- **Apprenticeships**

BIS Research Paper No. 77 *Evaluation of Apprenticeships* (BIS, 2012ii) provides a schedule of costs per Apprenticeship delivered at Intermediate and Advanced level by Sector Subject area. As we do not have data on the sectors in which ULF supported Apprentices are working, we have used 2013/14 data from the Statistical First Release³⁵ on the number of learners nationally starting Intermediate and Advanced Apprenticeship in each sector. This allows us to produce a weighted average cost per Apprenticeship. Discussions with the SFA confirm that the Apprenticeship funding methodology has not changed substantially since 2012, when BIS RP No. 77 was published. An assumed rate of inflation of 5% has however been added to the cost per Apprenticeship.

- **Developmental / informal Learning**

The average cost is derived from the SFA Funding Statement for 2013 – 2016. This provides an annual budget for Community Learning and a target for the number of learners to be supported annually. As courses tend to be completed within the year and following discussions with the SFA, a unit cost per course has been derived from this data.

³⁵ This is the last year for which full data is available.

- **Higher Education**

The cost to the exchequer is based on data for the annual average tuition fee charged by Higher Education Institutions (£8,170), reduced to take account of the proportion that is likely to be funded by Government. Latest estimates suggest that 50% of student loans for higher education will not be repaid³⁶.

- **Short Courses and continuing professional development**

The cost of delivering short courses and CPD has been based on values for vocational qualifications factored down to 20% of the overall cost, to account for the small qualification size and lower inferred benefit.

The total cost of delivering ULF instigated training (of all the forms listed above) is estimated to be £86m.

Productivity Foregone

When estimating the economic impact of learning and return on investment, it is important to include an estimation of productivity foregone due to employees taking time out of work to take part in learning.

We have calculated productivity foregone on the basis of the average number of guided learning hours required to acquire qualifications at different levels (mainly taken from the SFA Funding Rates Database) multiplied by the average hourly wage of people with different qualification levels. In the absence of precise data, the number of learning hours per qualification type is based on the average number of credits for all Awards, Certificates and Diplomas at each (NVQ) level, weighted by the proportion of all learners nationally working towards each size of qualification. It is important, however, to note a considerable proportion of union learning takes place outside working hours, in the evenings, lunch-breaks and community learning centres. Therefore, in the absence of precise information, we have estimated that 50% of union learning requires staff to take time out of their normal working duties, and factored down the outcome for productivity foregone by this amount.

Returns to employers

Research suggests that raising the proportion of workers who are trained by 1 percentage point (from 10% to 11% for example) is associated with an increase in value added per worker of 0.6 %, and an increase in wages of about 0.3% (Dearden et al, 2005). The inference is that the benefits of training accrue relatively equally to employers and their employees. This finding, that the total productivity gain from training is roughly double the growth in earnings experienced by individuals is factored into the impact model, by including a net productivity benefit to employers equal to the wage premia experienced by individuals. However, as productivity foregone is a cost that falls upon employers, employee wages lost while in training are subtracted before arriving at a final estimate of the return to employers.

³⁶ In 2014, The Guardian was reporting that the 'Resource and Accounting Budgeting Charge' on HE Loans had risen to 48.6%. A 50% figure is used for simplicity. <http://www.theguardian.com/education/2014/mar/21/student-fees-policy-costing-more> .

Returns to the Exchequer

The exchequer benefits from learning in many ways, including through the positive impacts on health, reduced crime and increased civic participation explored in the previous chapter. While these benefits are important, they are impossible to model with any reliability and are therefore discounted from the impact model.

There are, however, estimable benefits to the Exchequer, in the form of higher:

1. Income Tax receipts on increased individual earnings above £10,600 threshold, at a rate of 20%. Within our model we have deflated this to 15%, on the basis that 25% of union learners will continue to earn below £10,600 per annum³⁷.
2. National Insurance contributions on increased individual earnings at 12% on earnings of £153 to £815 per week.
3. VAT receipts, estimated at a rate of 9.7%, due to the exclusion of non-VAT'able items such as food, on the marginal propensity to consume due to increased income, which is calculated at 64% in line with the methodology outlined in BIS 2011ii.
4. Employer National Insurance contributions on increased individual wages at 13.8% on earnings above £156.

The Exchequer also profits from reduced benefit and welfare payments, resulting from people with higher skills being more likely to be in employment and from reduced dependency on in-work benefits as a result of increased wages. Unfortunately these factors are too complex for straight-forward modelling and are therefore discounted from our estimate.

Normally, estimations of the returns to the Exchequer from learning would include an estimation of tax forgone due to learners being out of the labour market during learning. However, as very few union learners leave employment when taking up learning opportunities we have discounted this cost to the Exchequer.

On this basis of this simple model, the return on to the exchequer generated by ULF Round 15 is £2.40 per £1.00 invested, as shown in Table 36 below.

Table 36: Estimate of return to the exchequer

	Increase in individual earnings	% to Exchequer	Benefit to Exchequer
Income Tax on raised individual earnings	£580,000,000	15%	£87,000,000
National Insurance on raised individual earnings	£580,000,000	12%	£69,600,000
VAT receipts on raised individual earnings (post tax)	£371,200,000	9.7%	£36,000,000
Employer N.I. contributions on raised individual earnings	£429,000,000	13.8%	£59,200,000
Return to Exchequer			£251,800,000
Rate of Return			£2.5

³⁷ Gross Return Annual Survey on Hours and Earnings suggests that around 16% of people earn less than £10,000 per annum. We have increased this to 25% to take account of the fact that Union Learning supports people who tend to be less well paid than average. The proportion of union learners working part-time, who are more likely not to pay income tax, is broadly in line with the average for all UK workers.

Reliability checks

Given the uncertainties inherent within these estimates, we have checked our results by running a secondary analysis, using CE / IER's calculation of the net present value (NPV) of attaining qualifications at different levels. NPV is the net benefit derived from raising qualification levels, to all parties, less the costs associated with undertaking the qualification³⁸. NPV can be estimated on the basis of "learner starts", allowing us to produce an estimate of impact that does not rely on survey evidence, apart from the data on the proportion gaining higher levels or lower / the same levels of qualifications and our calculation of the counter-factual. Using this approach, the estimated impact of ULF Round 15 activity is £1.18bn. This figure is around 45% above the result of our impact model.

One reason for this difference will be that the NPV values are calculated on the basis of a much younger cohort of learners. On the basis of our survey results, we have estimated the average age of union learners to be 44. The maturity of learners allows less time for the benefits to accrue, even when discounted over time.

A further check of our estimates was also carried out using the findings set out in BIS Research Paper No. 53 examining the *Returns to Intermediate and Low Level Vocational Qualifications* (Conlon et al)³⁹. This report provides estimates of the earnings and employment impacts of gaining Level 2 and Level 3 qualifications, with premia provided for different types of qualifications at these levels (BTEC, City & Guilds & NVQs). Although we do not have information on the proportion of Union Learners who achieved BTECs, City & Guilds or NVQs at Level 2 or Level 3, we can use this data to create high and low end values that can be used as a basis for a further check.

Using the data in Conlon et al, the combined wage and employment impact of ULF supported learning for Level 2 and 3 qualifications might be expected to be between £342 million and £687 million. However, when we isolate Level 2 and Level 3 learning and look solely at the wage and employment impact of ULF Round 15 (not productivity) our model generates an estimate at £288 million, a figure around 16% below the bottom end of the range. Given the older than average age of union learners, this result was not unexpected and is consistent with the previous suggestion, that our estimates err on the side of caution.

Sensitivity analysis

As a further check, we conducted a sensitivity analysis to assess the impact that a 20% change (positive and negative) in our calculation of the value added by ULF Round 15 would have on our estimates of both impact and return on investment.

Currently the value added by ULF Round 15 (i.e. the proportion of learning presumed to have taken place only as a result of the intervention) ranges from 64% for functional skills learning to 49% for CPD.

³⁸ NPV ranges from £112,000 per attainment of a Level 2 Apprenticeship to £25,000 for developmental learning.

³⁹ The values in this report are those set out within New Economy Unit Costs Database, which is being promoted by the What Works Centre for Local Economic Development as a basis for impact estimation.

As would be expected, adjusting the “deadweight” estimate⁴⁰ has a large impact on our overall economic impact estimate, but only a marginal impact on our estimate of the return on investment. This is because the investment only includes the delivery costs of learning that is triggered as a result of ULF Round 15 activities. This variable cost, which dwarfs the fixed cost of investment in ULF Round 15, rises and falls within the sensitivity analysis in line with the return. The effect of adjusting both the cost and the benefit means that the rate of return on ULF investment remains relatively static, despite the overall economic impact changing significantly, as shown in Table 37.

Table 37: Sensitivity analysis – added value

	-20%	No change	+20%
Economic Impact	£795 million	£1,025 million	£1,260 million
Return on investment (per £1)	£9.60	£10.25	£10.70

⁴⁰ The proportion of learning that would have happened without union support

Method used to estimate ULF Round 15 Wage Impact

	Calculation	Source
Number of ULF Learners	a	ULF Round 15 Final Claims
% completing course	b	Union Learning Survey
Number completing course	$c = (a \times b)$	Calculated
% Gaining a Higher qual	d	Union Learning Survey
% Gaining Same or Lower qual	e	Union Learning Survey
Number of learners gaining Higher qualifications	$f = (c \times d)$	Calculated
Number of learners gaining the same or lower qualifications	$g = (c \times e)$	Calculated
Number of years learners remain in Labour market	h	Union Learning Survey
Wage Premia for those gaining higher qualifications (%)	i	CE/IER in BIS Research Report No. 38
Wage premia for those gaining same or lower Level qualifications (%)	j	CE/IER in BIS Research Report No. 38
Proportion of qualification gained	k	Estimated
Average wage for learners studying each qualification type	l	ONS / ASHE
Wage Premia per learner (£) - per annum - Learners gaining higher qualifications	$m = (i \times k \times l)$	Calculated
Wage Premia per learner (£) - per annum - Learners gaining same or lower qualifications	$n = (j \times k \times l)$	Calculated
Wage Premia per learner (£) - working life - Learners gaining higher qualifications	$o = (h \times m)$	Calculated
Wage Premia (£) - working life - Learners gaining same or lower qualifications	$p = (h \times n)$	Calculated
Wage Premia - all learners - working life - those gaining higher quals	$q = (f \times o)$	Calculated
Wage Premia - all learners - working life - those gaining same or lower quals	$r = (g \times p)$	Calculated
% of learning resulting from ULF intervention (i.e. adjustment for counter-factual)	s	Union Learning Survey
Total impact of learning due to wage premia	$t = (q + r) \times s$	Calculated

Method used to estimate ULF Round 15 Employment Impact

	Calculation	Source
Employment Premia for those gaining Higher Qualifications	u	CE/IER in BIS Research Report No. 38
Employment Premia for those gaining Same / Lower Qualifications	v	CE/IER in BIS Research Report No. 38
Average annual wage for learners studying each qualification type	w	ONS / ASHE
Wage Premia per learner (£) - per annum - Learners gaining higher qualifications	$x = (u \times w)$	Calculated
Wage Premia per learner (£) -per annum - Learners gaining same or lower qualifications	$y = (v \times w)$	Calculated
Wage Premia per learner (£) - working life - Learners gaining higher qualifications	$z = (h \times x)$	Calculated
Wage Premia (£) - working life - Learners gaining same or lower qualifications	$aa = (h \times y)$	Calculated
Wage Premia - all learners - working life - those gaining higher quals	$ab = (f \times z)$	Calculated
Wage Premia - all learners - working life - those gaining same or lower quals	$ac = (g \times aa)$	Calculated
% progressing into learning due to ULF (i.e. taking counter-factual into account)	ad	Union Learning Survey
Total impact of learning due to Employment premia	$ae = (ab + ac) \times ad$	Calculated

Wage Impact and Employment Impact are then added. From this total, the delivery costs (ULF Round 15 plus course delivery costs) and productivity foregone (Guided learning hours x average wage) are subtracted, to generate an overall estimate of economic impact.

ANNEX 3 – UNION LEARNING SURVEY QUESTIONNAIRE



Dear Learner,

Encouraging learning is an important activity for trades unions. In 2013, unions enabled 220,000 people to take part in a wide variety of learning programmes.

The University of Exeter has been commissioned by nine unions to conduct a survey exploring the impact that union learning has on the lives of union members.

To do this we need your help.

We need you to take five minutes to tell us about your union learning and to reflect on your motivations for learning, the skills you gained and the impact that acquiring these skills has had on your life.

Please be reassured that your responses will be treated in strict confidence: all data will be reported in summary form and it will not be possible to attribute your responses to you personally.

If you have any questions about the survey or need help in completing it please contact B.Neild@exeter.ac.uk at the University of Exeter.

Thank you for your help. Your response is important to us.

A handwritten signature in black ink that reads "Ben Neild".

Ben Neild
University of Exeter



Union Learning Survey Questionnaire

Part 1 - Your experience of learning

Q1. How many times have you taken part in union learning? ***Please put a cross (x) in one box only.***

- Once..... ☐
- Twice..... ☐
- Three times..... ☐
- Four to six times..... ☐
- More than six times..... ☐

Q2. What kind(s) of union learning have you taken part in?
Please put a cross (x) in the box for each category of learning that you have taken part in.

- Functional Skills – English & Maths..... ☐
- ICT / Digital / Computing skills..... ☐
- ESOL – English as a Second or Other Language..... ☐
- Informal learning for pleasure, leisure or personal development..... ☐
- Short course or event to gain skills and knowledge related to your work or professional development..... ☐
- Vocational course at a college or training provider that resulted in you gaining a qualification (full or part) at Level 2 or Level 3..... ☐
- Higher education and training at Level 4 or above at a university or college ☐
- Training to be a union learning representative..... ☐
- None of the above ☐

Q3. When did you last take part in union learning?
If you are currently on a course, please tick 'Within the last month'. Tick one.

- Within the last month..... ☐
- Between 1 and 6 months..... ☐
- Between 7 and 12 months ago..... ☐
- Between 13 and 24 months ago..... ☐
- Over 24 months ago..... ☐

Q4. What was your **main** motivation for taking part in union learning? 'I wanted to...' **Please put a cross (x) in one box only.**

- perform better in my current job..... ☐
- advance my career, gain promotion or a pay rise..... ☐
- gain skills that would be useful in my every day or home life..... ☐
- support people in my community or workplace..... ☐
- do something fun / meet new people..... ☐
- other..... ☐

Q5. Have you gained a qualification or part of a qualification as a result of taking part in union learning? **Please put a cross (x) in one box only.**

- Yes (go to Q6) ☐
- No (go to Q7)..... ☐
- Not sure (go to Q7)..... ☐

Q6. If 'Yes', was this qualification at a higher level than other qualifications you already held before you first took part in union learning? **Please put a cross (x) in one box only.**

- Yes..... ☐
- No..... ☐
- Not sure..... ☐

Q7. Did you complete your most recent union learning course? **Please put a cross (x) in one box only.**

- Yes, I completed the course..... ☐
- No, I left before it ended..... ☐
- Not applicable, the programme lasted one day or less..... ☐

Q8. How likely is it that you will undertake any further learning in the next 2 years? **Please put a cross (x) in one box only.**

- Very likely..... ☐
- Quite likely..... ☐
- Neither likely or unlikely..... ☐
- Not very likely..... ☐
- Not at all likely..... ☐
- Don't know..... ☐

Q9. How important has your union been in supporting your learning for example by providing support through a union learning representative or a learning centre or by setting up a learning agreement with an employer? **Please put a cross (x) in one box only.**

- Extremely important..... ☐
- Very important..... ☐
- Moderately important..... ☐
- Slightly important..... ☐
- Not at all important..... ☐

Part 2 – The impact of your learning

Q10. Would you say that union learning has helped you to develop any of the following?
Please put a cross (x) in all boxes that apply.

- Literacy / Reading or writing skills..... ☐
- Numeracy / Maths skills..... ☐
- English language skills / ESOL..... ☐
- Self-confidence / a sense of what I can achieve..... ☐
- Coaching / mentoring skills..... ☐
- Planning and organising skills..... ☐
- Budgeting / Money management skills..... ☐
- ICT / Digital / Computing skills..... ☐
- Vocational / Practical skills / Professional development..... ☐
- Creative Skills..... ☐
- Other Skills..... ☐

Q11. Has union learning given you any new skills that you might use in your current job?
Please put a cross (x) in one box only.

- Yes..... ☐
- No..... ☐
- Not sure..... ☐

Q12. Has union learning given you any new skills you might use to get a new job or to change into a different type of work? **Please put a cross (x) in one box only.**

- Yes..... ☐
- No..... ☐
- Not sure..... ☐

Q13. Have any of the following things actually happened as a result of you participating in union learning? **Please put a cross (x) in all boxes that apply.**

- You got a new job or changed to a different type of work..... ☐
- You got a pay rise..... ☐
- You gained promotion or greater responsibility in your job..... ☐
- You were able to do your job better..... ☐
- You stayed in a job, which you might have lost..... ☐
- You feel more confident in progressing in your career..... ☐
- You feel more confident about finding a job in the future..... ☐
- You are more involved in your union..... ☐
- You became a Union Learning Representative..... ☐
- You are more involved in voluntary or community based activities ☐
- None of the above..... ☐

Q14. To what extent do you agree or disagree that as a result of union learning you have...
Please put a cross (x) in one box for each of the following

	Completely agree	Agree	Neither agree nor disagree	Disagree	Completely disagree
• Become more enthusiastic about learning	☐	☐	☐	☐	☐
• Got a better idea about what you want to do in your life	☐	☐	☐	☐	☐
• Become more confident in your abilities	☐	☐	☐	☐	☐
• Improved your quality of life / well being	☐	☐	☐	☐	☐
• Become more likely to undertake further learning and training	☐	☐	☐	☐	☐
• Become a more capable parent e.g. better able to help my children with school work	☐	☐	☐	☐	☐
• Become better able to organise, mentor and support other people	☐	☐	☐	☐	☐

Section 3 – About you

Q15. What is the name of your union? ***Please put a cross (x) in one box only.***

- BFAWU..... ☐
- CWU..... ☐
- GMB – Southern..... ☐
- GMB – Yorkshire and North Derbyshire..... ☐
- PCS..... ☐
- RCN..... ☐
- UCATT..... ☐
- UNISON – Bridges to Learning..... ☐
- UNISON – Inclusive Learning..... ☐
- Unite..... ☐
- USDAW..... ☐
- Other..... ☐
- Unsure / prefer not to say..... ☐

Q16. Gender ***Please put a cross (x) in one box only.***

- Male..... ☐
- Female..... ☐
- Prefer not to say..... ☐

Q17. How old were you on your last birthday? ***Please put a cross (x) in one box only.***

- 16 to 24..... ☐
- 25 to 49..... ☐
- 50 to 64..... ☐
- 65 or over..... ☐
- Prefer not to say..... ☐

Q18. How would you describe your ethnic origin? ***Please put a cross (x) in one box only.***

- Asian or Asian British..... ☐
- Black or Black British..... ☐
- Chinese..... ☐
- Mixed race..... ☐
- White British..... ☐
- White – Other..... ☐
- Other (please specify)..... ☐
- Prefer not to say..... ☐

Q19. Is English your first language? **Please put a cross (x) in one box only.**

- Yes..... ☐
- No..... ☐
- Prefer not to say..... ☐

Q20. Do you consider yourself to have a disability? **Please put a cross (x) in one box only.**

- Yes..... ☐
- No..... ☐
- Prefer not to say..... ☐

Q21. Which of the following best describes the main thing you are doing now? **Please put a cross (x) in one box only.**

- Employed full-time..... ☐
- Employed part-time..... ☐
- Self-employed..... ☐
- Not employed and looking for work..... ☐
- Not employed and not looking for work..... ☐
- Retired..... ☐

Q22. If you are employed are you... **Please put a cross (x) in all boxes that apply.**

- Employed on a fixed term or temporary contract..... ☐
- Employed through an agency..... ☐
- In a permanent job..... ☐
- Prefer not to say..... ☐

Q23. Are you currently claiming any income-related state benefits or tax credits? **Please put a cross (x) in one box only.**

- Yes..... ☐
- No..... ☐
- Not sure / prefer not to say..... ☐

Q24. What is the highest level of qualification that you hold? **Please put a cross (x) in all boxes that apply.**

- Entry and Level 1 qualifications, NVQ Level 1, Pre-Apprenticeship (Level 1), BTEC Level 1, Functional skills, English or Maths at Level 1..... ☐
- Level 2, GCSEs A-C, BTEC diploma, NVQ Level 2, Intermediate Apprenticeship, Functional skills, English or Maths at Level 2..... ☐
- Level 3, A/AS Levels, BTEC National, NVQ Level 3..... ☐
- Level 4, Degree Year 1, BTEC higher National Certificate, NVQ Level 4, Higher Apprenticeship..... ☐
- Level 5, Degree Year 2, BTEC Higher National Diploma, NVQ Level 5..... ☐
- Other qualifications / overseas qualifications..... ☐
- None..... ☐

Q25. Is there anything else that you would like to say about your union learning? **Please write in the box below.**

Would you be happy for your response to the previous question to be used anonymously in the report describing the findings of this survey and future publications?

- a) This survey?
- Yes..... ☐
 - No..... ☐
- b) Future Publications?
- Yes..... ☐
 - No..... ☐

Would you be happy for the University of Exeter to contact you to discuss your responses to this survey in more detail? For this purpose they would have access to your individual responses to all of the questions in the survey and also the details you provide below, so they can ask further questions to understand the reasons behind your responses. **Please put a cross (x) in one box only.**

- Yes..... ☐
- No..... ☐

If 'yes', please provide your contact details below.

Name:

Address:.....

.....

.....

Email:.....

Telephone:.....

Thank you for taking the time to complete the survey. Please return in the envelope provided as soon as possible or by Monday 15th December 2014 to BMG Research, Holt Court, Heneage Street West, Birmingham Science Park Aston, B7 4AX. As a market research agency BMG Research complies with the Market Research Society's Code of Conduct. This ensures that your replies will be treated confidentially. If you want to check BMG Research is a genuine market research agency please call the Market Research Society's Freephone number – 0500 396 999 – Office hours only.

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