



# Working for learners

a handbook for unions and their  
union learning representatives

Third edition, April 2011

## Unionlearn mission statement

Unionlearn will provide a strong and supportive framework for unions to maximise their members' life chances through accessing high quality learning. It will also strengthen their voice at work through the effective training of their lay representatives and professional officers.

- *Working for Learners* provides basic information and advice. For more detailed information and advice log on to the unionlearn website [www.unionlearn.org.uk](http://www.unionlearn.org.uk).
- An online version of *Working for Learners* is to be found on [www.unionlearn.org.uk/workingforlearners](http://www.unionlearn.org.uk/workingforlearners) which is continually updated.
- There is a separate toolkit for ULRs in Wales – *Union Learning Representatives: new rights, new opportunities* [www.wtuclearn.org/downloads/Toolkit.pdf](http://www.wtuclearn.org/downloads/Toolkit.pdf)

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Learning and skills are major factors in how an employee progresses at work and accesses better life chances.

Union involvement in workplace learning can increase the amount of training an employee receives. Where there is a union learning representative (ULR), 46.5 per cent of employees received five or more training days in the last 12 months compared to 29 per cent in workplaces where there is no ULR.

Learning can also play an important part in strengthening union organisation and increasing membership. That is why unions are putting learning and skills high up their agenda. ULRs have the confidence of union members, the recognition of employers and the support of unions. Since 1999 over 26,000 ULRs have been recruited and trained to carry out their many functions. In union recognised workplaces ULRs, like union representatives as a whole, have the right to paid time off to train and to carry out their role. Over 170,000 learners are supported by unions each year and many of these are helped by ULRs.

This handbook is one of the resources unionlearn has designed to help unions and their ULRs in England negotiate and broker learning opportunities and to support their members in that learning. This edition includes new developments in union learning as well as changes in government policy resulting from the election of the coalition government and new case studies.

I hope this handbook will be of help to you in your important role.

A handwritten signature in blue ink that reads "Tom Wilson".

**Tom Wilson**  
Director, unionlearn





Jess Hurd/reportdigital.co.uk

## Section 1

# Benefits of ULRs

Trade unionists have different reasons for becoming a ULR. Many are already union representatives who are interested in the learning agenda and wish to promote the benefits amongst the membership and establish a partnership with their employer. Others are trade union members who have come back into learning themselves and want to promote its value to their colleagues. Two-thirds of ULRs hold another union post. This might be a shop steward, branch officer, health and safety rep or equality rep. Whatever the reason for taking on the role, the vast majority of ULRs have found it both challenging and rewarding.

ULRs give employees contact with someone who:

- they know and who may have helped them in the past
- is completely independent, whose advice they can trust
- they know will treat everything they say in confidence if necessary
- can give advice in the familiar surroundings of the workplace
- can provide information about learning opportunities, available both inside and outside the workplace
- is properly trained and informed, capable of representing their learning needs and interests with their employer
- is trained to work with providers of learning to shape the opportunities to meet the needs of workplace learners
- provides up-to-date information about learning and skills initiatives from Skills for Life to higher education.

### The ULR who introduced tailor-made learning

Clothes shop worker **Bharti Dhamecha** became ULR of the year in 2010 for the very stylish work she's done promoting learning to colleagues at the Leeds branch of high street chain Primark. Bharti, a shop steward, equalities rep and ULR for USDAW, started working at the high street clothing store when it opened five years ago without any union members. She became a ULR in 2007 and soon made her mark, recruiting young members and reps to the union. She has crucially also won respect from the store's management.

“When people say to me that they do not need a union because they have no problems at work, I tell them that unions are not there only when you are in trouble; they can play a vital role in improving your skills and job prospects,” she says.

Bharti, who works on the shop’s tills, has introduced off-the-peg courses such as ESOL and maths, as well as tailor-made learning, including a skills swap-shop in the staff canteen. Thanks to Bharti, large numbers of her colleagues have joined USDAW and she has helped persuade the store’s management to start a scheme that pays for all staff to take NVQs.

### The union effect

There is robust evidence which demonstrates the value of ULRs and other union reps to the training of the workforce. Union involvement in training increases the likelihood that employees receive it and increases the number of days employees train. Yet few employers negotiate with unions, with most employers merely consulting or informing their workforce about training. A significant number of employers do not even inform their employees about training.

The following statistics arise out of an analysis of the Workplace Employment Relations Survey (WERS) carried out for unionlearn by Leeds University Business School<sup>1</sup>.

■ Where a union is recognised, managers reported that 34.5 per cent of employees received five or more training days in the last 12 months compared to 23.5 per cent in non-unionised workplaces.

1. Stuart, M. and Robinson, A. (2007) *Trade Union Recognition and Collective Bargaining: Findings from the 2004 Workplace Employment Relations Survey*. Research Paper 4. Centre for Employment Relations Innovation and Change, Leeds University Business School. London: unionlearn.

- Where unions are recognised and negotiate over training, employees are 24 per cent more likely to report having received some training in the last 12 months.
- Where a workplace has ULRs, recognition and employee representatives, employees are 15 per cent more likely to report receiving training. Where there are recognised unions but no employee representatives then the probability of receiving training is far less – 8.5 per cent.
- ULRs also have an impact on the incidence of training. Where there is a ULR, 46.5 per cent of employees received five or more training days in the last 12 months compared to 29 per cent in workplaces where there is no ULR.
- There is more negotiation over training in workplaces with a ULR (13 per cent) compared to those with union representatives as a whole (9 per cent) and especially those with non-union representatives (2 per cent).

## The training divide

Over the past decade the numbers achieving high level qualifications have increased by more than 3 million (or by 44 per cent) and the numbers without any qualifications have declined by more than 1.5 million (or by 26 per cent). But on current trends the UK is unlikely to improve its relative international position and will remain in the bottom half of OECD countries on low and intermediate skills by 2020 because other countries are progressing further and faster on upskilling. Much more needs to be done to narrow the divide between the training ‘haves’ and the ‘have nots’:

- 4.6 million people have no qualifications.
- Of those, 3.5 million fall into at least one of the target groups who experience low levels of employment (i.e. they are disabled, aged 50 or above, a lone parent or from an ethnic minority).
- Over 5 million people ( 16 per cent of the working

- population) do not have functional levels of literacy.
- Over 9 million adults have never accessed the Internet yet 90 per cent of today's jobs require such ICT skills
- Lone parents with no qualifications have an employment rate of just 30 per cent.
- As many as 23 per cent of people with a disability have no qualifications compared to 10 per cent with no disability.
- As many as 18 per cent of 50–59 year olds have no qualifications compared to 9 per cent of 25–49 year olds.
- Only 41 per cent of the 25–49 age group and 30 per cent of the 50–64 age group is currently or has recently participated in learning compared to 64 per cent of the 18–24 age group.
- 16 per cent of the non-white population have no qualifications compared to 12 per cent of the white population.
- About 10 million employees (44 per cent of the workforce) go without training every year.
- Just over 10 per cent of employees with no qualifications received job-related training in the last 13 weeks compared with over 40 per cent of graduates.
- 1.8 million employees lack the necessary skills required for their job.
- Yet there is the long tail of employers (35 per cent in total) covering more than one quarter of the workforce who do not offer any training at all to their employees.

The TUC and its unions seek to bridge the gap and provide opportunities for those who have had least before, especially those who need to improve their Skills for Life (i.e. literacy, language and numeracy). ULRs can do much to help promote and deliver fairer learning opportunities at the workplace.

Some groups of workers have extra difficulty in accessing learning through work – part-timers, shift workers, home workers, freelance and agency workers for example. Others have jobs without a base or obvious focus for learning activity – for example, construction workers and drivers.

As women workers overall are still poorly paid compared with men, access to training – whether at basic or higher levels – can open doors for them. Similarly black and Asian workers are less likely to benefit from opportunities and gain promotion. Workers with disabilities are already disadvantaged in the workforce and difficulties associated with access to learning can make things worse. There are many workers for whom English is a second language and who will be prevented from getting on the skills ladder without ESOL courses.

### The ULR potential<sup>2</sup>

The unionlearn-commissioned survey of ULRs has revealed their potential, profile and effect. ULRs now have many opportunities to help tackle the training divide.

- All ULRs in union recognised workplaces have a legal right to paid time off to train and to carry out their duties.
- Over half have formal learning partnerships setting out their arrangements.
- Almost a half are in workplaces with a formal entitlement to paid time off for learning for the members they represent.
- Over eight in ten ULRs have done the TUC initial training course, the rest have done one provided by their union.
- Almost nine in ten feel that they have sufficient training to carry out their role effectively.
- Over a third of ULRs have a learning centre at their workplace.

There are however some challenges for unions and their ULRs which they need to engage with employers.

- Typically ULRs spend four hours a week on union learning activities but receive only two hours paid time off by their employer.
- Only one in five receives cover for their regular job.
- Over a third of ULRs stated that managers did not negotiate on

2. the statistics in the following section are from *Learning Works: Report of the 2009 survey of union learning representatives and their managers*. unionlearn

decisions over learning and a quarter did not even consult with them.

- Less than a half of ULRs felt that senior managers valued their activities.
- Around a quarter of union members that ULRs represent were given no training by their employer.

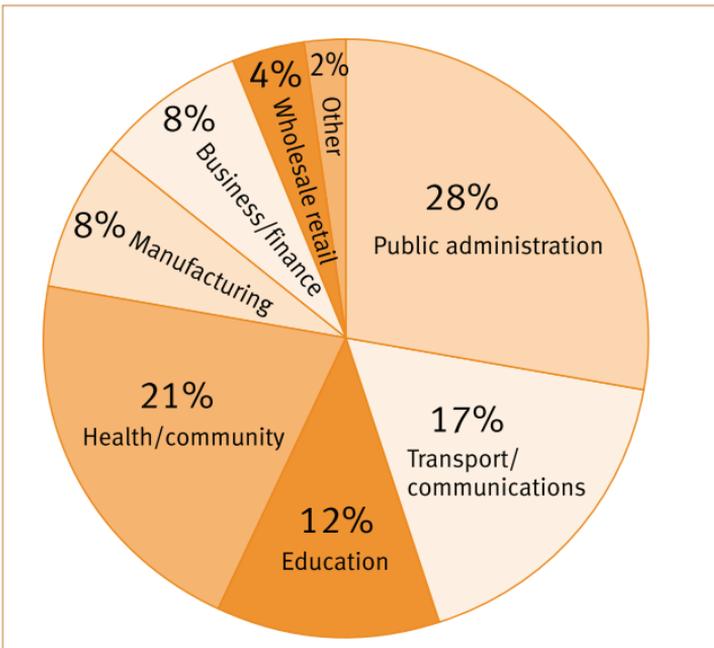
The purpose of this handbook is to offer some practical suggestions on how these challenges can best be met.

## The ULR profile

On the face of it, union learning reps might look no different from any other union activist. Over half are men (57 per cent) and more than three out of five are aged between 46 and 60 years. But look a little deeper, and it becomes clear that the profile has been changing. Over a third of ULRs have never held a union post before – ‘new activists’ – and they are more likely to be women and younger than those that have. These trends mean that the ULR profile is becoming diverse, more like the make up of the workforce as a whole.

Over two-thirds of ULRs work in the public sector. Two-thirds of ULRs are located in workplaces employing over 1,000 workers.

## Active ULRs by sector



### Supporting learners

ULRs help open up learning opportunities for union members and also support them during their learning. They also help to develop a learning culture in companies and other workplaces.

ULRs support learners in diverse ways such as:

- enabling learners to access impartial information and advice on their learning needs and options
- conducting a learning needs assessment
- helping colleagues get funding for learning
- ensuring that those employees with literacy and numeracy needs receive the encouragement and support required to improve those skills
- helping members access ESOL courses
- encouraging the older workforce to take up ICT courses
- providing support to employees who may be reluctant to take up new methods of learning such as that provided online
- accessing re-training and upskilling for employees facing redeployment or redundancy
- helping run learning centres at the workplace.

### Nature and extent of ULR activity (% ULRs)

Provided information and advice to colleagues on learning opportunities	94
Networked with ULRs from other workplaces	79
Arranged (or helped to arrange) courses for colleagues	77
Recruited (or helped to recruit ) new members into the union	74
Conducted a learning needs assessment	53
Helped colleagues to get funding for learning	48.5

ULRs have had considerable impact on the number of union members taking up different types of learning.

## Impact of ULR activity on number of learners

Type of learning	increased	stayed the same	decreased
Training leading to recognised qualifications	59	39	2
Training in basic literacy and numeracy skills	57	40	3
Personal interest/leisure courses	53	41	6
Continuing professional development	52	43	5
Job-related training not related to formal qualifications	46	51	3

## Working with employers

It is not just ULRs who believe that they increase learning at the workplace. Almost nine in ten managers responding to the ULR/manager survey stated that they valued the contribution made by ULRs. According to the managers, ULR activity had increased the provision of training within their workplaces:

- three in five stated it had helped to improve union-management relations
- three in five also stated it had raised basic skills levels
- over a half stated that ULRs had helped to close skills gaps
- almost a half stated that it increased the demand for training.

Some employers, however, are reluctant to give ULRs sufficient time-off for their roles. Employers will incur costs in terms of providing paid time off for ULRs and unpaid time for employees to meet them. Nevertheless, employers are likely to see benefits in the form of increased productivity, lower staff turnover, increased job satisfaction and higher added-value products and services as a result of a better trained workforce and improved industrial relations. A regulatory impact assessment calculated that any short-term loss of productivity that results from time-off is greatly outweighed by the added value to future productivity of employees upskilled as a result of ULRs' advice and support.

The benefits to workplaces have been recognised by the professional organisation representing HR and training managers, the Chartered Institute of Personnel and Development.

### The employer case for ULRs in the workplace

- ULRs can be important allies in promoting the value of learning and training.
- They are effective in generating ‘bottom up’ demand for learning. Although their primary role is promoting learning for employee needs, this can include providing support for on-the-job learning and creating wider demand for work-related training.
- ULRs have a significant role to play in engaging workers who might otherwise be reluctant to discuss their learning needs.
- ULRs are trained in their role and will have ongoing opportunities for related learning.
- They are an inexpensive source of advice for the employer.
- ULRs will have the confidence of their membership and having union involvement will give added reassurance to employees.
- The union provides an additional source of communication and information about learning opportunities through its internal structures and communication channels. This may be particularly useful in reaching part-timers and shift workers.
- ULRs will encourage broader learning to meet employees’ needs (as opposed to the training they might normally receive that relates to their current job).

Source: *Trade Union Learning Representatives: The Change Agenda*. CIPD (2004)

### Strengthening union organisation

As well as increasing opportunities for individual members and developing a learning culture at the workplace, union learning renews union activism and strengthens the union voice. This, in turn, sustains learning activities. Three quarters of ULRs have recruited new members into their union. Unions are increasingly promoting a relationship between learning and organising at

national level. The role of ULRs is being increasingly formally recognised by unions and becoming part of their organisation at all levels – workplace, branch, regional and national.

Learning has become a key strand in union campaigns particularly around organising migrant and agency workers.

### The Justice for Cleaners campaign

Unite's organising and learning departments have made learning central to the union's organising campaign among migrant and other vulnerable workers within the cleaning sector at Canary Wharf, in the Tube and in the City of London. The two departments work together on this joint project, which builds on the union's three-year Justice for Cleaners organising campaign for better pay and conditions across the three sites. A number of cleaning companies have signed voluntary recognition agreements with the union. The campaign aims to deliver lifelong learning to the heart of the organising agenda by providing migrant workers with access to the learning they need and the confidence to build their union. ULRs are key to this process. The campaign had so far attracted seven ULRs through a seminar run for activists. The union is beginning to sign learning agreements with the major contractors, who are recognising the benefits of learning for their workforces, particularly English for Speakers of Other Languages (ESOL) courses which are held on Saturday mornings on union premises, organised around work-based and trade union issues as well as Skills for Life.

### Learning and organising top tips

#### *Value learning*

Learning and organising are both important in their own right. If members feel that learning is simply being 'used' as a recruitment tool, it will be less successful. Every workplace is different, and in planning your learning project remember to value learning for its own sake. Use the arguments on the value of learning – see page 37.

#### *Plan for growth*

When planning your workplace learning project, remember to think about how you can:

- maximise its potential to strengthen workplace organisation or attract new members
- identify sources of local or regional help, e.g. training for the union. Contact your union or regional TUC for information, help and advice
- as you think about learning needs, also think about the key challenges to union organisation in your workplace. How can your learning project or activity help you meet those challenges? Think in terms of new representatives and new members
- develop a learning plan or strategy which reflects what members want, not just what management wants
- on multi-union sites, aim to have an agreed learning and organising strategy with other unions.

Make your learning initiatives sustainable – this will mean new members are more likely to stay in the union.

#### *Map your membership*

When developing your workplace learning project you will need to find out the specific learning needs and issues of your members or potential members. Consider doing a learning needs survey.

Think about the particular needs of new groups or members such as young, women, graduate, ethnic minority, contract, agency, shift or casual workers. Mapping these needs and issues – which will vary within and between workplaces – will give you a better understanding of the issues that really matter to your members. This process will raise the profile of your union. Use your mapping exercise to identify areas of strength and weakness for union organisation in your workplace. Where are your members/non-members? Are men more likely to join the union than women (or vice versa)? Are some departments or sections better organised than others, and if so why?

### ***Mainstream learning***

Union learning reps can help ensure workplace learning is both union-led and sustainable – and they can also make a massive difference to union organisation in a workplace. Maximise the impact of ULRs by thinking about how best they can work alongside existing reps and stewards, get involved in and support existing workplace or branch structures, and contribute to the wider work of the union.

Encourage union reps to take the learning and organising course which is designed for reps who are not ULRs (see page 56).

### ***Negotiate a learning agreement***

Negotiating a learning agreement helps embed learning in the workplace and secures employer commitment to supporting lifelong learning and skills. Working together, union learning reps and stewards can ensure that workplace learning projects and initiatives support the wider work of the union in the workplace, company or organisation. A model TUC learning agreement can be found on page 33.

Your union's full-time officer or organiser should be able to help you negotiate a learning agreement, and you can also get support from your regional unionlearn team.

### *Publicise your successes*

Union-led initiatives around learning and skills 'add value' to the union card and are a great showcase for the positive work that unions do. Make sure that members and non-members alike are aware of your successes, and the role the union has played in delivering your learning project or activity. So publicise what you do:

- give union learning a high profile through posters, notice boards and newsletters
- use successful learners to recruit other new members and learners
- use your union's logo on all learning materials.

Think about how you can include non-members in learning. Non-members often join the union as a direct result of the union's positive work on learning – and enthusiastic learners are great advocates for trade unionism.

### *Encourage members to play an active role*

About a third of ULRs are new activists. So you will need to think about how to encourage members who have never been a union rep to become a ULR. Think about how you can use your workplace learning project or activity to encourage more members to get involved. Publicise and use ULR statutory rights to paid time off for training and work. Encourage members to take on the ULR role, or simply ask people to help with the mapping exercise or distributing publicity or information about the project in their work area.

Lifelong learning can't be 'done' to members – think creatively about how you engage them in your project or activity. And don't forget that many people who come into union activism via learning then go on to other roles within the union.



Sarah Turton

## Section 2

# Functions, rights and agreements

The key functions undertaken by ULRs are set out in the Employment Act 2002.

## Statutory functions

### *Analysing learning or training needs:*

- this could, for example, include understanding the different methods for identifying learning interests or needs
- being able to effectively identify and record individual learning needs or being able to draw up a plan to meet identified learning requirements.

### *Providing information and advice about learning or training matters:*

- including, for example, the development of communication and interviewing skills
- knowledge of available opportunities, in order to be able to provide accurate information to members about learning opportunities within and outside the workplace
- the ability to signpost members to other sources of advice and guidance where additional support is needed, for example, basic skills tutors or fuller in-depth professional career guidance.

### *Arranging and supporting learning and training:*

- for example, obtaining and providing information on learning opportunities including e-learning where available, supporting and encouraging members to access learning opportunities and helping to develop and improve local learning opportunities
- promoting the value of learning and training
- some examples of this activity could be, understanding current initiatives for the development of learning and skills in the workplace, promoting the value of learning to members and within trade union networks and structures, working with employers to meet the learning and skill needs of both individuals and the organisation, and appreciating the value of learning agreements and how they may be developed.

*Consulting the employer about carrying out such activities*

*Preparing to carry out the above activities.*

In the past, ULRs have had difficulty in obtaining time-off from employers to carry out their duties and to train for them. That is why the TUC and its unions persuaded the government to introduce statutory recognition that gives learning reps similar rights to union representatives as a whole.

The Employment Act 2002 gives rights to paid time-off to ULRs provided:

- they are in independent unions – such as those affiliated to the TUC
- are in workplaces where unions are recognised by the employer for collective bargaining purposes.

### Statutory rights

- Union learning representatives are entitled to reasonable paid time off for training and for carrying out their duties as set out above.
- Union members are entitled to unpaid time off to consult their learning representative, as long as they belong to a bargaining unit for which the union is recognised.

The way these rights can be implemented is set out in the revised ACAS Code of Practice on Time-off for Union Representatives. [www.acas.org.uk/index.aspx?articleid=2391](http://www.acas.org.uk/index.aspx?articleid=2391)

## How to secure recognition and paid time off

- The union needs to give notice to the employer in writing the name of the appointed ULR (see sample form on page 25).
- The ULR needs to be sufficiently trained to carry out his/her duties either at the time of the notice or in normal situations within six months (which may be extended to take account of unforeseen circumstances).
- Whether training is 'sufficient' is determined by the union and should cover the functions set out in the Employment Act.
- The training could be the completion of a TUC training course or an individual union programme or the demonstration of relevant expertise or experience to operate effectively as a ULR (e.g. acquired as a teacher, trainer or counsellor). A course need not lead to a qualification although that would be desirable.
- The employer would have to pay the wage that the ULR would have earned had they worked during the time taken off for training.
- In the case of ULRs who work flexible hours then they are entitled to training during normal hours and be paid accordingly.
- The union/ULR should inform the employer either of the training undergone or to be undertaken.
- During the six month period in which she or he is undergoing training the ULR must be allowed time off to perform their duties.
- Once the employer is notified of the ULR, his/her past training or intention to train, then the employer is obliged to recognise the ULR by providing paid time-off to carry out the duties and in respect of any required further training.
- Time off should be considered for further training to help ULRs develop their skills and competencies.

The amount and frequency of the time-off has to be 'reasonable' in all circumstances. For example, when a ULR arranges to have

a meeting with members it must be at a time that does not undermine the safety and security of other workers in the production process. Employers also need to be reasonable and ensure that ULRs are able to engage with hard-to-reach groups such as shift workers, part-time staff and those employed at dispersed locations.

ULRs should provide management with as much notice as possible of the purpose of the time-off, the location and the timing and duration and the contents of any training course.

Employers should consider making available facilities necessary for ULRs to perform their functions such as rooms for meetings/interviews, office space, use of notice boards and electronic access such as the internet and emailing.

When a union feels that an employer is being unreasonable and refusing to grant paid time-off for ULR duties or training or enabling union members to access ULR services then the union can lay a complaint to an employment tribunal.

### Union learning representative appointment form

#### How to use the form

Once the ULR appointment has been ratified by the branch committee, the branch secretary/area organiser completes the details and signs and dates the form.

The branch secretary/area organiser:

- sends a copy to the employer as written notification of appointment with an explanatory letter if appropriate
- keeps a copy for their own records
- contacts local (name of union) office to get the member identified as a ULR on their ULR database
- arranges training for the new ULR.

*To the employer – a sample*

Please amend your records accordingly.

<p><b>Union learning representative's details</b></p> <p>name _____</p> <p>home address _____</p> <p>postcode _____ work department _____</p> <p>telephone number home _____ work _____</p> <p>email address _____</p>
<p><b>Employer's details</b></p> <p>name _____</p> <p>home address _____</p> <p>postcode _____</p> <p>telephone number _____</p>
<p>Union learning representative's bargaining unit _____</p> <p>details of workplace/work departments covered _____</p> <p>_____</p>
<p>Name of branch _____ branch number _____</p> <p>Signature of branch secretary/area organiser _____</p> <p>date _____</p>

**Barriers to ULRs carrying out their role**

In spite of these statutory rights, ULRs still find barriers to carrying out their duties.

Most of these barriers are experienced not just by ULRs but also by union representatives as a whole. That is why the previous government carried out a review of workplace representatives' facilities and facility time. The review found that some representatives 'face problems in successfully balancing their normal work duties with their representative functions...which can lead to their under-performance as workplace representatives'.

ACAS has published a guide to accompany the revised code which advises on some of these issues:

[www.acas.org.uk/CHttpHandler.ashx?id=2307&p=0](http://www.acas.org.uk/CHttpHandler.ashx?id=2307&p=0)

It states that employers should ensure that, where necessary, work cover and/or work load reductions are provided when time off is required. This can include the allocation of duties to other employees, rearranging work to a different time or a reduction in workloads. The purpose of the guide is to provide advice on good practice and as such it has no standing in law.

### *Right to request time off to train*

The right to request time to train was included in the Apprenticeships, Skills, Children and Learning Act which received Royal Assent in November 2009 and came into force for employees working for employers of 250 and more from April 2010. The government will not extend the right to employees working for employers of 249 and under from April 2011 as planned by the last government but unions could negotiate the voluntary adoption of the Act's provisions to help develop a 'learning culture'.

The right gives employees a statutory right to ask their employer for time to undertake study or training. The type or level of training is not specified and there is no requirement for the training to lead to an accredited qualification. On the job training is within scope of the legislation as well as short courses where employees may be seeking to develop a particular skill, for example, learn how to use a new software package. However, the training should help improve the performance of the employee and the business.

Employers are required to consider the request and respond in a set timeframe. Within 28 days of receiving a request employers must either approve the request or arrange to hold a meeting to discuss the request with their employee. Within 14 days of that meeting the employer must inform the employee in writing of their decision. Employers are not obliged to pay for the training

or the training time. They may turn down requests if they consider that one of the following business reasons applies:

- the proposed study or training would not improve the employee's effectiveness in their business
- the proposed study or training would not improve the performance of the employer's business
- the burden of additional costs
- agreeing to the request would have a detrimental effect on the employer's ability to meet customer demand
- the employer would be unable to reorganise work among existing staff
- the employer would be unable to recruit additional staff
- agreeing to the request would have a detrimental impact on quality
- agreeing to the request would have a detrimental impact on performance
- there would be an insufficiency of work during the periods the employee proposes to work or
- there are planned structural changes during the proposed study or training period.

There is a right of appeal. Union learning representatives have an important role to play in promoting knowledge of the employment right, developing branch or workplace committee strategy and advising and supporting members. There is a right of accompaniment to meetings for each individual who exercises the right. Early union polling indicates that an agreement is reached with the employer in four out of every five applications.

### *Model letter*

Dear [Employer's Name]

#### Right to request time to train

Training is something that our members value greatly, as do all responsible employers. As you know, it can sometimes be difficult for employees to say what kind of training they would like or feel they need. That is why there is a statutory right for employees working for employers of 250 and above to request time to train. This new right will help encourage all employees to think about their training needs. Employers can of course refuse requests but need to show a sound reason. Unions, and in particular union learning representatives, can help employees put forward a sensible and well considered request, which employers and managers will find helpful. All in all, the new right should help to boost levels of effective training, to the benefit of both employers and employees, particularly in these difficult times.

I am therefore writing to suggest that it would be useful to meet in order to talk through the best way to manage this new right. There are many issues worth considering including:

- whether to wait for individual requests or whether collective approaches might be more effective
- how to communicate awareness of the new right and the positive role that union representatives can play in helping employees formulate requests
- who should receive and respond to requests, on behalf of the employer
- there are model template letters for each stage of the procedure, outlined in the legislation, whether these or an agreed variant should be used
- how to respond to incomplete requests, or where a revised request is needed
- following agreement to requests, issues such as evaluation of the training, pay and/or time off, support for course fees, flexible working hours, or other forms of support.

## Strengthening union involvement in learning and skills

The TUC has, over the years, called for the following statutory rights.

- Adult workers without a Level 2 qualification should have a universal right to paid time off to achieve such a qualification.
- More employers should negotiate with unions on training by it being included as a collective bargaining issue in the statutory union recognition procedure.
- ULRs and union reps as a whole should have sufficient facilities and facility time to carry out their roles in learning and skills more effectively.
- Unions in recognised workplaces should have the statutory right to negotiate learning agreements and to establish joint learning committees with the employer.

## The need for learning agreements

The ACAS guide does not specify the minimum number of ULRs or union reps in general that should be appointed, or state the number of hours per week that union representatives require to undertake their duties. It states that this will depend on the circumstance of each case and it is up to management, with the union and the union representatives, to determine what is appropriate for them. For example, difficulties can occur where a ULR has an additional union rep role. The unionlearn ULR survey found that as many as 64 per cent of the respondents were in this category. The ACAS guide states that in calculating what time off is reasonable in these circumstances it is not appropriate simply to add the requirement for each role into a total sum. It is sensible to agree how the multiple roles can best be undertaken in a way which regulates or predicts time off from work to certain periods. This can include agreeing priorities and allowing flexibility on the timing of time off.

The ACAS guide thus states that what is reasonable will vary according to the type of representative and the operating requirements of the employing organisation. That is why the

guide recommends that an agreement or protocol be drawn up in each workplace, and/or the wider organisation as this can establish legitimate expectations for time off arrangements among representatives and managers. It can also help avoid confusion and minimise disputes. Such agreements should set out what time off and access to facilities is reasonable and appropriate in the particular circumstances.

The TUC believes that some of the problems that ULRs experience could be overcome by a learning agreement. A formal agreement between a union and an employer on time-off can avoid misunderstanding and ensure fair and reasonable treatment. The agreement would form the basis of your organisation's learning agenda and could include rights of access to training and learning. About half of ULRs have such a formal learning partnership and access to a learning committee.

Unions in recognised workplaces have a statutory right to negotiate on pay and conditions. There is as yet, however, no statutory right for unions in recognised workplaces to negotiate on training issues for their members. Such negotiations over training are voluntary and happen in less than 10 per cent of recognised workplaces.

Some unions who already have machinery for negotiating training may wish to include arrangements for ULRs. Some unions may have included them in a separate facilities time agreement with the employer that might cover all union representatives. Others might wish to establish a separate learning agreement. It will very much depend on the union and the workplace.

Union representatives or ULRs, depending on the union policy and practice, could negotiate a separate learning agreement. A learning agreement can include some or all of the following:

- a commitment from both parties to establishing a culture of learning
- an equal opportunities statement covering equality of access to learning

- safeguards to ensure that such arrangements do not undermine collective bargaining arrangements where they exist
- setting objectives concerning learning outcomes such as Skills for Life, ICT, apprenticeships, CPD etc
- the roles of the union, ULR and employer
- the number of ULRs and how the union will appoint them
- the amount of permitted paid time off for ULRs to carry out their duties, and undertake training
- cover arrangements for ULRs when they are carrying out their duties
- facilities for ULRs such as a room to conduct interviews, use of telephone, electronic mail, Internet, notice boards etc
- the amount of time off permitted for union members to meet their ULRs and if it could be paid time off
- statement of what types of learning are eligible for paid and unpaid leave and what courses could be subsidised by the employer
- arrangements for employees to have time off to access IAG
- the procedure for employees requesting time off for training including role of ULR/union rep
- the procedure for resolving disputes concerning providing time off
- arrangements for payment to be made for time off and whether payment might be made to shift and part-time employees undertaking trade union duties outside their normal working hours
- terms of reference for a joint learning committee and membership
- establishment of a learning centre
- methods of identifying learning needs e.g. learning needs surveys/IAG support
- monitoring take up and tracking learner progress
- a guarantee that information on learners are only used for learning purposes and not in relation to remuneration, promotion or selection for redundancy
- employer contribution to costs
- establishment of a Collective Learning Fund to lever in employer and provider contributions to make learning more

affordable (see pages 42–45) and time off to learn, as well as employer contribution to course fees.

ULRs will wish to increase the numbers of employees in workplaces who get paid time off to train and this is best achieved through negotiation with the employer. This could be included in a learning agreement or as part of a general agreement over such core issues as pay and conditions.

You may wish to negotiate a learning agreement based on the model on the next page, which could be tailored to meet the policies of your union, the needs of your members and the context of your workplace.

The model is a basic framework and unions could include additional clauses covering the issues listed above.

### A model framework learning agreement

- This agreement is between [insert name of union] and [insert name of organisation].
- Both [insert name of organisation] and [insert name of union] are committed to working in partnership to promote and support lifelong learning and ensure equal access to learning opportunities.
- Both parties will encourage staff to take up learning activities.
- The union will be responsible for recruiting ULRs and will inform management of the names and workplaces/departments of the ULRs.
- The number of ULRs will be [insert number].
- The functions of the ULRs should cover (insert functions based around ACAS code).
- Paid time-off will be granted to ULRs to enable them to carry out their duties effectively. [state an agreed minimum amount of time].
- Paid time-off will be granted to ULRs in order to undertake training. Initial training will take place as soon as possible after appointment.
- Employees will also be entitled to time-off (when and when not it will be paid) to participate in promotional events, IAG sessions and to access their ULR.
- A procedure will be established to resolve any disputes about the application of the ACAS code.
- Suitable facilities will be provided e.g. offices space, filing cabinets, stationery, telephone, access to electronic equipment including e-mail, notice boards etc.
- A joint learning committee will be established no later than [insert timescales for establishing the committee] from this agreement (see page 34 for possible terms of reference).
- A Collective Learning Fund will be established to help make learning affordable and accessible. It shall be managed and overseen by the joint learning committee.
- The terms of this agreement will be reviewed by the learning committee at regular intervals to ensure that they continue to reflect the needs of the workforce.

### Joint learning committee: terms of reference

#### Role

The overall aim of the group will be to promote, initiate, support and monitor lifelong learning activities across the site. It will work to make learning opportunities as accessible and affordable as possible to all employees, enabling them to increase skills and maximise their own potential.

#### Membership

The steering group will comprise of [number to be agreed at each site] nominated union learning representatives, (ULRs), a senior union representative from each recognised union, a senior operations manager, representatives from the human resources and training functions, a project worker/advisor from the relevant trade unions and a nominated person from the partner college. The group will also reserve the right to co-opt representatives from other outside agencies to assist as and when necessary.

#### Meeting arrangements

The steering group will meet on a regular basis as required, but no less than six times per year. The group will be chaired by the operations manager and the ULR co-ordinator will take responsibility for collating items and compiling the agenda. Action points from the meeting will be recorded by a nominated member of the group.

#### Responsibilities

- identify learning needs and aspirations of employees on site in line with the ULR learning needs analysis
- develop and promote a range of on-site learning initiatives, to encourage individuals back into learning, including a designated learning centre on site
- monitor and evaluate activities, feedback and effectiveness of the initiative in accordance with agreed criteria
- work together with colleges and other outside bodies to maximise potential for learning opportunities
- identify funding, both internal and external, to assist with

learning activity and explore options for making learning both affordable and sustainable

- support the network of ULRs in their role as advocates and organisers of learning
- explore new initiatives both within and outside of the company which will support the learning process
- administer and manage the site level Collective Learning Fund in accordance with the jointly agreed learning fund regulations
- ensure effective communication with the existing trade union's and company's structures regarding the aims, objectives and progress of the lifelong learning initiative
- provide a standard site level report to the National Learning Committee on a regular basis.





Sarah Turton

## Section 3

# Supporting ULR activities

The activities of a ULR can be very wide-ranging. They include promoting the benefits of learning, signposting a range of courses to members, carrying out a learning needs assessment, arranging for college tutors to come to the workplace to deliver learning at a time to suit members' needs, supporting members with literacy and numeracy needs or running a workplace learning centre.

## Promoting the value of learning

Many employers regard training their workforce as a cost rather than an investment for the future. There is a long tail of mainly small and medium-sized firms who do not train their workers. Often, employees who have the least qualifications are unaware of the benefits of learning. ULRs can do much to make the argument for training and learning.

## Why training matters – facts and figures

### *Training can lead to greater productivity*

- A five percentage-point increase in the number of workers trained can result in a four per cent increase in value added per worker.
- The effect of training on productivity is around twice as great as the effect of training on wages, with the 4 per cent increase resulting in 1.6 per cent increase in wages. So both employees and firms can share in the gains from employer-provided training.

### *Qualifications mean better pay*

- For those without qualifications in the labour market their average salary is nearly £450 a week less than the highest qualified group. Workers with no qualifications are 30 per cent more likely to be low paid compared to those holding a degree. Workers whose highest qualifications are at Level 3 (A levels), Level 2 (5 GCSEs A–C) and Level 1 are 10 per cent, 15 per cent and 22 per cent respectively more likely to be low paid than those who hold a degree (Level 4).

### *Training reduces the chance of unemployment*

- Workers under 30 and in the labour market are half as likely to be unemployed if they are qualified to Level 2 than if they have no qualification at all.

### *The better qualified you are the more likely you are to get further training*

- Whilst 40 per cent of those with degrees or above receive job-related training, only six per cent of those without qualifications do so.

### *Higher skills can mean a longer life*

- In the highest skill group, mortality rates fell by 44 per cent between 1971 and 1992, compared to only a 10 per cent fall within the lowest skill group.

## Supporting learners

ULRs have a key role in informing and supporting learners in the workplace. Their main activities include:

- interviewing members, listening, asking questions
- identifying and analysing their learning needs
- checking out any practical problems that will get in the way of learning such as study costs or childcare
- helping members decide what to do and make plans
- finding information and signposting
- brokering with providers such as colleges and setting up learning opportunities
- offering continuing support, mentoring and coaching.

Unionlearn has developed some tools and resources to help ULRs to support learners in the workplace.

## Unionlearn Learning and Careers Advice Service

Unionlearn has joined forces with Next Step Advice to provide a free, impartial and confidential service tailored to the needs of unions and their



members. ULRs can call the service on behalf of members or signpost them to the service so that they can use it themselves.

### *What the service offers*

Using the telephone helpline (08000 92 91 90, free from a landline), union members can:

- call from 8am to 10pm, seven days a week
- speak to an adviser for information and advice on courses, jobs, paying for training or finding childcare
- have a longer interview and develop an action plan with a careers coach
- access information and advice in nine different community languages.

On the website [www.unionlearn.org.uk/uladvice](http://www.unionlearn.org.uk/uladvice), ULRs and union members can:

- email an adviser
- search for a course
- find out about jobs and careers
- get help with writing a CV
- find out about funding, childcare and other forms of support
- access free downloadable resources including leaflets and posters.

### **The union learning Climbing Frame**

The union learning Climbing Frame is a free, easy-to-use, interactive website that allows ULRs to create pathways for learning and action plans for individuals that can be reviewed and updated as they progress on their learning journey. It provides up-to-date information and advice for ULRs about a broad range of learning opportunities. In addition, ULRs can keep ongoing records of whom they are working with and where they are heading. Accessible and user-friendly, it is set to make life a lot easier for ULRs and is certain to help promote the idea of learning in the workplace.



ULRs and other union reps can use the Climbing Frame to:

- obtain up-to-date information to help in discussions with members
- work with learners to develop an individual action plan
- gather information about learning needs to support negotiations with employers.

The Learning Themes are useful sections of information which have specifically been developed with ULRs and learners in mind. ULRs are able to browse topics of interest and search for specific terms, services and providers. Information can be accessed easily with useful text, downloadable documents and recommended websites. Unions and organisations also have the opportunity to create their own Learning Themes which can include information of specific interest to their members and sector. The unionlearn Learning Themes available to all users include:

- supporting learners
- apprenticeships
- Skills for Life
- recession, redundancy and recovery
- ICT
- adult and community learning
- higher learning
- learners with disabilities
- trade union education
- learning with your union
- moving into management
- learning and organising
- personal development and career planning.

The Learner Management section of the Climbing Frame enables ULRs and other union reps to construct a personal Climbing Frame with individual learners to help identify and access learning pathways. The ULRs and other union reps can:

- add a new learner and create union learner details record
- create a personal Climbing Frame and Action Plan with each learner by helping them set goals and create actions
- record and access learners' achievements

■ generate learner reports.

ULRs can also produce a ULR Report which is a statistical report on all the learners that they have been working with. The My Notes area of the website can be used to keep a note of their own contacts and local information. ULRs can also make use of the in-built discussion forum, useful links, Climbing Frame News and case studies.

A training module on the Climbing Frame is available as an option in the union learning rep Stage 2 course (see page 54). To register to use the Climbing Frame go to [www.climbingframe.unionlearn.org.uk](http://www.climbingframe.unionlearn.org.uk)

### Caroline Simblett, ULR at Newcastle City Council

“I was first introduced to the Climbing Frame when volunteers were being recruited to get involved in the pilot at Newcastle City Council. I found that one of the biggest benefits of using the Climbing Frame was that it was a good ice-breaker when talking to learners that you do not know very well. It became a useful tool between staff as well, as they could compare how many goals and actions they each had and generated greater staff interest in learning. I currently use the Climbing Frame to map training and development carried out by staff and to help them with their appraisals and personal development plans. It is an excellent way of keeping a record of completed training dates. It makes my job easier – it is also a good way of recording when and who you have advised as a ULR. I found the Climbing Frame very helpful indeed!”

### Next Step

The Next Step service provides information about work and learning opportunities available locally, how to apply for a job and plan a career as well as information about benefits. It can also provide advice on issues such as identifying skills needs, information about the job market, job search skills, financial

support, and about services available in the case of redundancy. ULRs can help their members access these services. You will need to keep up to date on future changes to the service and it is a good idea by checking on the unionlearn website.

### Lifelong Learning Accounts

Lifelong Learning Accounts are being developed as a mechanism to help individuals take control of their learning and working life, through a variety of tools available online. In addition, skills and careers advice is available over the telephone or through face-to-face sessions. They will replace Skills Accounts which have been trialled regionally and will provide:

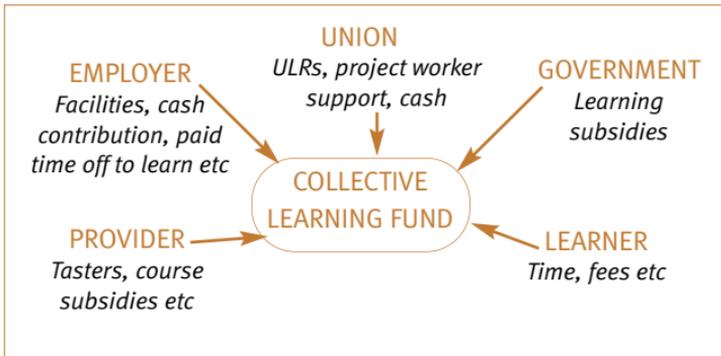
- access to various forms of financial support for learning
- incentives for learning, including a means of recognising the social contribution made through volunteering
- access to personalised information about previous learning and qualifications as well as information on the pay and employment benefits of taking different courses
- access to the new all-age careers service alongside the personalised information in their account.

The government is looking for ULRs to play a proactive role in supporting the take up of the new accounts. Further information about Lifelong Learning Accounts will be provided on the unionlearn website [www.unionlearn.org.uk](http://www.unionlearn.org.uk) as it becomes available.

### Collective Learning Funds

At a time of stringent cuts in publicly provided further education and withdrawal of some learning entitlements the challenge for unions is how to increase more private investment in the skills of the workforce. Collective Learning Funds are union-led initiatives to stimulate co-investment in the personal development of the workforce to make such learner affordable and accessible. They are a way of leveraging cash and in-kind contributions from employers, providers, unions and individuals. Key players are trade unions and their ULRs. Collective Learning Funds are often

underpinned by a learning agreement between management and the union(s) and delivered through a joint union/management learning committee. There are a number of possible sources for contributions to a Collective Learning Fund.



## Contributions to CLFs

- Employers can contribute in a number of ways by providing paid time off for study, paying some or all of the tuition fees or providing loans, establishing and equipping learning centres at the workplace and providing facility time for union learning reps to support learners. Employers are often more disposed to make in-kind rather than cash contributions.
- The state can contribute by providing entitlements to free tuition for certain groups of learners and subsidising course provision for learners in general.
- Providers can offer free taster courses to potential learners, subsidise courses, help equip learning centres and provide tutors for the centres.
- The learner can study in his or her own time. There are many examples of employers offering employees one hour to study in work time, provided that this is matched by one hour study in their own time. Learners also often contribute to the cost of the fees where there is limited public eligibility to funding.
- Unions also can make a contribution. Some can contribute

cash but the most likely contribution is that of time. For example, ULRs use some of their own time to support learners and run CLF projects.

A Collective Learning Fund project was established by unionlearn in the North West and East Midlands. Most of the pilots had begun to establish ways of pooling resources to help make learning more accessible and affordable. They resulted in the following outputs:

- 2,719 learning opportunities (including 721 Skills for Life, 527 ICT, 884 NVQs and 587 wider/personal development)
- 5 Workplace Learning Centres established
- 9 Learning Committees established or refreshed.

### *DWP Benefits Office, Lincolnshire*

The civil servants union, PCS, has a high membership in the benefits office. PCS reps made it clear that the CLF was to meet the needs of the workforce for NVQs to improve their employability. The fund was ‘kick started’ with £4,000 from unionlearn. The employer provided travel expenses for events. The employer also gave assistance in kind – time for assessments/debriefing, flexibility, printing costs, rooms and facilities. The learning was usually in the employee’s own time, and the union gives time and resources. State funding was drawn down to meet part of the cost of the NVQ assessor training through Train to Gain.

### *Learner outcomes*

- 22 learners signed up to NVQs in Customer Service or Information, Advice and Guidance at Levels 2, 3 and in one case Level 4.
- 4 learners have completed Skills for Life at Level 2
- A series of Deaf and Dyslexia Awareness sessions have taken place in work time.

The PCS branch secretary felt that the existence of the fund had been empowering – and that the fund had

helped the union be an equal party to decisions about how the learning runs, rather than have to go ‘cap in hand’ to management.

“CLF has clearly kicked started learning opportunities that staff would not have had before. This has shown a positive working relationship between employer and union which has been a great benefit to all staff.”

Graham Peck PCS Lead ULR

For help in setting up a CLF order the toolkit *Making Learning Affordable – Setting up Collective Learning Funds: a toolkit for trade unions*

[www.unionlearn.org.uk/publications/index.cfm?frmPubID=187](http://www.unionlearn.org.uk/publications/index.cfm?frmPubID=187)

## Working with providers

As a ULR you may need to establish partnerships with outside organisations in order to promote lifelong learning amongst members. A major barrier to members becoming involved in learning is that courses are often inaccessible and arranged at times which make it difficult to attend. Establishing a partnership with a college means you can agree that courses will be run at times and in places which suit members’ needs.

In larger workplaces, colleges may agree to run courses in a workplace learning centre. In smaller workplaces ULRs have agreed on-site learning using laptop computers provided by the local college.

The cost of some courses can be prohibitive to individuals but you can use the fact that you are representing a number of learners to negotiate reduced rates.

Finding the right people to talk to in a college can be difficult and time consuming. A good place to start is by contacting your regional unionlearn team who work closely with a number of colleges in their area (see Section 8).

### Supporting workplace learning centres

Learning centres within or near the workplace are an integral part of the lifelong learning agenda. They help to create a learning culture and widen participation. Learning centres contribute towards the integration of both vocational and non-vocational learning and show a commitment from all parties to employee development. Some employers in partnership with trade unions have set up learning centres within their own premises. There are over 400 union-led learning centres in locations such as workplaces, colleges and union offices. Many are open to family, friends and the wider community. Over 100 of these centres are part of the UL Online network and deliver 'myguide', which offers a wide range of courses to help beginners have hands on experience of computers including access to the Internet.

#### *Extending online learning to the wider community*

Six years on, the POA Union Learning Zone based in the Mersey Care NHS Trust's e-Café at Ashworth Hospital continues to benefit learners through online learning. The Learning Zone is the regional centre for ULRs who are based across a wide geographical area in the North West. It covers 17 prisons altogether, with over 300 learners accessing the centre on a regular basis and services staff, family members and users from the hospital. The Learning Zone is also part of a national network of UK online centres committed to improving the lives of people by giving them the skills, training and confidence to learn online. There are 30 ULRs working at the Learning Zone, from both the Trust and the POA, and they work as a unit by encouraging and supporting each other. Not only does the Zone engage with staff but it also engages older learners in the community. Older learners are welcome to learn basic ICT skills, such as email and Skype and some even use their newly acquired skills to keep in contact with families abroad.

Some of these centres offer online learndirect courses as well as other courses. They form part of the national network of union

learning centres called U-Net. There are 70 centres in total – 25 larger centres supporting 45 smaller outreach centres. Offering learndirect courses means that learning centres can be open and available to learners at a variety of times. Many centres offer a wide range of learning such as ICT skills, Skills for Life, foreign languages and NVQs. In 2007-08 about 1,200 learners were on Skills for Life and ICT programmes. U-Net was inspected by Ofsted in 2009 and their report awarded a Grade 2 ('good' standard) for all aspects of learning provision.



### ULR support for U-Net learners

Support for learners is outstanding, and union learning representatives provide excellent peer support for learners. Regular supplementary training maintains their expertise. ULRs are highly effective as role models. They work very effectively with learners reluctant to participate or who have poor prior experience, and successfully promote learning to non-traditional learners. Most ULRs work closely with tutors, effectively encouraging those learners making slow progress and motivating them to continue their learning. ULRs negotiate well with managers on behalf of learners, for example, to increase access to learning. Learners value their input highly and cite it as the most important element in their learning. Union learning representatives provide good information and advice on appropriate courses although information advice and guidance in centres is overall satisfactory.

Ofsted report on TUC unionlearn (U-Net) 2009

Developing better access to learning is an important element in the role of the learning representative. Learning centres also act as an access to flexible learning and are therefore a gateway to future opportunities.

The partnership approach is perhaps the key to establishing a

successful learning centre as part of a learning agreement (see page 33). It is also the best way to address issues such as literacy, numeracy and ICT. Partners should include the employer, trade unions and a learning provider. TUC Education put on courses for experienced ULRs on running learndirect learning centres as part of the unionlearn network. For further information phone the U-Net support centre on 0191 227 5567. Unions will want to ensure that ULRs have the facility-time to support learners in the centre. Where this happens, take-up is likely to be higher.

### Matrix Standard

All information, advice and guidance providers who receive funding from the Learning and Skills Council to deliver their services are required to be accredited or working towards the quality standard for information, advice and guidance services. This is called 'Matrix'. Matrix is a quality standard, which proves competence in the delivery of information, advice and guidance. Many trade unions and employers have already achieved the Matrix Standard for the information, advice and guidance they give to their members and employees in union learning centres. Securing Matrix accreditation is not hard if you're committed to providing the best possible IAG – whether that's to members or potential members of your union branch, union employees, or whoever your project is designed to help. Over the past few years, the Matrix Standard has provided a flexible framework with which to develop and improve services, helping achieve clarity and consistency in its management and delivery.



#### PCS learning centres awarded Matrix Standard

Four PCS union-led workplace learning centres in the North East have been awarded the Matrix Standard for their delivery of information, advice and guidance on learning and work. Each centre is part of several union learning projects run throughout the Civil Service

departments by PCS and partners to help union members and staff improve their skills and take advantage of the learning opportunities they can provide. All four of the projects have been supported by unionlearn with the Northern TUC's Learning for All fund. Over 90 union learning reps have helped 2,000 people back into learning. Such is the commitment of the ULRs that 20 are now trained to offer expert level information, advice and guidance to their colleagues, having gained a Level 4 qualification; a professionalism that helped earn them the Matrix, and a recommendation that they go forward for the excellence award. Jan Gifford, PCS lifelong learning officer said: 'Achieving the Matrix is testament to all of the ULRs' dedication and professionalism'.

Further updates on the Matrix Standard will be posted on the 'providers' area of the Skills Funding Agency website <http://skillsfundingagency.bis.gov.uk>.

## Unionlearn Quality Award

The award is granted to particular programmes offered by providers which demonstrate that union learners are considered in the design, development and delivery of courses. A new version of the award has been developed and adopted so that careers information and advice services can now attain the award. It is increasingly recognised by ULRs and union learners as a mark of good practice criteria around working with unions and in teaching and learning. By the beginning of 2011, 100 providers had achieved the award. The Quality Award helps signpost ULRs to union-friendly provision.

### Quality Award criteria: working with unions

The new Quality Award will mean that careers information and advice services that achieve the standard have shown that their service is:

- accessible to working people
- flexible and adaptable to the needs of union members
- delivered by trained and experienced staff who have an

- understanding of workplaces and of unions
- based on consultation with unions and in line with their aims and values
- impartial and confidential, with strong equality and diversity policies
- part of a quality assured network for signposting and referral
- representative of best practice and endorsed by appropriate assessors and inspectors

The unionlearn Quality Award is given for three years and reviewed annually. No fee is involved. The provider must work with a trained unionlearn assessor to demonstrate good practice and continuous improvement.



### *Pioneering college collects Quality Award*

Stephenson College, in Leicestershire, has been awarded by unionlearn for its pioneering work with apprentices and its successful partnership with local trade unions. Stephenson College was commended for its work with:

- Nottingham City Homes, where with support of the unions GMB and UCATT, it has participated in the One in a Million Scheme, which requires contractors to take on at least one apprentice for every £1 million spent
- Mansfield District Council, where it provided an adult apprentice programme as part of the housing department's in-house training.

It has also pioneered a new course to introduce young learners to brickwork, carpentry and joinery, painting and decorating and plumbing, whilst improving their literacy, numeracy and ICT skills. The college prepared students for the world of work by focusing on their personal and social development, including learning about dress codes, timekeeping and attendance and how to write job applications and tips on interview techniques.



Jess Hurd/reportdigital.co.uk

SECTION 4

## Section 4

# ULR training

The effectiveness of ULRs depends very much on the training they get from the TUC or their union. As stated on page 23, under the Employment Act 2002 the ULR needs to be sufficiently trained to carry out his/her duties either at the time of their notice of appointment or in normal situations within six months of the appointment. To do this ULRs in recognised workplaces have a statutory right to paid time off to train.

All ULRs are given initial training for their role through courses provided by the TUC or individual unions. Many ULRs take the courses at trade union education centres in local colleges, run by a TUC tutor. The TUC courses are all accredited through the National Open College Network (NOCN). Many ULRs have also done further training. For further information on ULR programmes and centres log into [www.unionlearn.org.uk/courses](http://www.unionlearn.org.uk/courses) or contact the unionlearn regional education officer (see Section 8) or your union education officer.

## Union Learning Representatives Stage 1 course: five-day programme

This course is designed for union representatives who are new to representing members on learning and introduces the role of the ULR, the importance of learning and skills at work and provides the tools and knowledge that will enable ULRs to carry out their role successfully. The course will help you:

- understand union structures, and how your union organises around learning
- build a broad perspective of the ULR role
- find out about developments in learning and appreciate issues affecting learning
- work with members and other reps to define priorities
- take a planned approach to your own and members' development
- develop the skills of putting the union case on learning
- work collectively as part of the union team.

### Union Learning Representatives Stage 2 course: five-day programme

This course has been designed to provide ULRs with the opportunity to develop existing essential knowledge and skills in areas that are fundamental to their role. Activities will give ULRs the opportunity to learn from professionals about new initiatives, learning choices, how learning is funded, supporting learners' networks and the role of U-Net centres. This course will help you:

- take stock of your development and identify aspects for further work
- choose and carry out a small project to develop learning relevant to your union and workplace role
- look at how your role links with wider union and organising strategies
- explore and develop an equalities approach to working on learning, particularly in supporting learners
- build knowledge and skills on specific aspects of learning of interest to ULRs in the context of your union and workplace
- review your learning progress, look forward and plan your next steps.

There are also online versions of the Union Learning Representatives Stage 1 and 2 courses for those union reps that need a convenient and more flexibly delivered course. They are fully equivalent to the classroom versions, with trained TUC tutors, materials and support for learners. Group activities take place via an online discussion board. Learners can log in and participate whenever it suits them and will receive support from TUC tutors specially qualified in online delivery methods. To apply for courses complete the online application form at [www.unionlearn.org.uk/ulr1online](http://www.unionlearn.org.uk/ulr1online) or [www.unionlearn.org.uk/ulr2online](http://www.unionlearn.org.uk/ulr2online)

## Other training programmes

In addition to the core ULR programme there are a variety of specialist programmes available for ULRs which lead to NOCN award qualifications. Short, linked programmes cover: developing workplace learning, supporting learners, mentoring and coaching skills, the Climbing Frame, Skills for Life and the union role, working with members, working with employers, negotiating with employers on learning, learning and organising, and supporting learners into higher learning. The average length of the programme is five to six days. OCN credits are available for all programmes. Award qualifications in the programme are made up of six credits.

### Developing Workplace Learning

This course is designed for union learning representatives and union representatives interested in developing workplace learning, including the use of computers and learndirect. Things you will learn about include:

- what is meant by workplace learning
- how your members could benefit from e-learning
- using learndirect as a tool for learning
- learning partnerships and a learning workplace
- workplace learning agreements
- making learning part of wider union activity.

### Supporting Learners

This course will help union learning reps:

- understand the role of the union learning representative in supporting learners in the workplace
- develop skills for supporting learners
- identify ways in which other organisations in the network can support learners in the workplace
- understand processes for reviewing and improving practice.

### Skills for Life and the Union Role

This course will help union learning reps:

- raise awareness at work
- encourage and support individuals and groups of members to

improve language, literacy and numeracy

- understand what quality learning assurances members have a free entitlement to
- find out how they can best work with Skills for Life specialists
- find out the extent and boundaries of the ULR role
- work with employers to get the best deal for members
- work with providers to get the best deal for members.

### **Mentoring and Coaching Skills for Union Reps**

This course will help union reps:

- understand the difference between mentoring and coaching
- understand the role of the union rep in mentoring and coaching individual union members
- identify and develop mentoring and coaching skills
- recognise opportunities for using these skills at work.

### **Skills for Life – the Whole Organisation Approach**

This course will help union learning reps:

- understand the potential impact of the whole organisation approach
- recognise the ways in which the union rep can support the whole organisation approach
- identify ways of working with employers and providers on the whole organisation approach.

### **Climbing Frame for Union Learning Reps**

This course will help union learning reps understand how the Climbing Frame can be used to enhance their own role and provide detailed and structured support for learners.

By the end of the course participants will understand how the Climbing Frame works and be able use it to help learners to:

- explore a variety of learning themes
- use the learner management tools to add and manage relevant information
- develop individual action plans with union learners and keep accurate records for ULR and individual learner use.

## Working with Members

This course will help union learning reps:

- review the learning and skills opportunities available in your workplace
- explain the equality issues around learning and skills
- identify individual learning needs and in particular Skills for Life needs
- understand important initiatives in learning and skills
- identify what information you need on learning in the workplace
- understand what is involved in an action plan on learning and skills in the workplace.

## Working with Employers

This course will help union learning reps:

- understand what is meant by a learning workplace
- identify suitable options for your workplace
- demonstrate an understanding of union agreements around learning and skills
- demonstrate an understanding of how your employer identifies training and learning needs
- demonstrate an understanding of how to negotiate with the employer
- demonstrate the ability to prioritise issues.

## Negotiating with Employers on Learning

This course will help union learning reps:

- develop and practice negotiating skills as union learning reps
- be more effective team negotiators
- understand the process of negotiating
- be familiar with different styles of negotiating
- understand how to prepare, present and negotiate
- develop good practice in negotiations.

## How to Work with Providers

This course will help union learning reps:

- understand how providers work
- understand the role of the ULR with the providers
- develop negotiating skills

- understand equality issues around learning
- understand the principles of developing partnerships with learning providers
- plan for the future.

### Learning and Organising

This course will help any union reps:

- examine the current situation in their workplace and identify some of the environmental factors that impact on the learning and organising agenda
- enhance knowledge and understanding of the link between learning and organising
- develop a coherent approach to integrating organising into learning activities
- analyse the characteristics that underpin successful and robust learning and organising initiatives
- examine the way in which learning can be used to raise the union profile at the workplace
- identify how to use the learning agenda to make unions more attractive to non-members and engage existing members
- examine the role reps can play in strengthening workplace organisation and the recruitment of new members
- formulate an action plan to develop and strengthen workplace learning projects to maximise opportunities for union growth and renewal.

## Supporting Learners into Higher Learning

This course will help reps:

- understand what is meant by higher learning
- identify how the ULR Higher Learning Toolkit can support them and their members
- Understand the reasons members may want to participate in higher learning courses
- understand the funding issues around higher learning
- understand the barriers members may face
- identify opportunities to raise the issue of higher learning courses with employers
- develop a strategy for supporting members into higher learning.

ULRs, particularly those who have never held a union position before, may wish to train for other union duties such as union reps or health and safety representatives (see chart overleaf).

## TUC Education pathway for ULRs

### *Union Learning Reps Certificate*

Union learning reps (ULRs) are helping to give people the skills and knowledge to improve their lives at work and beyond. They are making a real difference in workplaces up and down the country, raising the profile of training and development by providing advice, encouragement and information to members about a range of learning opportunities. As well as helping individual union members, ULRs have had a positive effect upon workplaces and organisations. The ULR Stage 1 course introduces the role of the ULR, the importance of learning and skills at work and provides the tools and knowledge that will enable ULRs to carry out their role successfully. The ULR Stage 2 course will provide ULRs with the opportunity to develop existing essential knowledge and skills in areas that are fundamental to their role, as well as undertaking a workplace specific learning project in a area of study relevant to their members' learning needs.

### *Awards*

Union learning reps can undertake Awards in the Union Reps and Trade Unions Today pathways, these include equalities, coaching and mentoring, and supporting learners. The ULR Stage 1 and ULR Stage 2 programmes can also be achieved separately as Awards in the Trade Unions Today pathway.

### *Diplomas*

Union learning reps can undertake Diplomas in the Union Reps pathway. The diploma programme provides opportunities for progression into other higher education programmes. All diplomas include skills development relevant to the area of study. The Employment Law Diploma covers individual rights, collective rights, and advocacy and legal research skills. The Contemporary Trade Unionism Diploma covers development of trade unions, trade unions today, and the future of trade unions. The Equalities Diploma covers equality issues at work, equality and the law and working for equality.

### *Progression*

The Activist Academy and the Organising Academy are progression routes within the TUC programme. Beyond the TUC programme, union learning reps go on to higher education through university degree programmes. Further information can be obtained from TUC Regional Education Officers. Union learning reps can continue to update their knowledge by attending further Award programmes.



Mark Thompson

## Section 5

# Learning opportunities

## Entitlements for learners

Millions more learners have gained basic and intermediate skills over the last decade than in the preceding decade.

Apprenticeship numbers have risen dramatically and remain a key platform for the future. In spite of this progress there is still much to be done. The UK Commission for Employment and Skills (UKCES) has recommended that the UK commit to becoming a world leader in skills by 2020. This requires having substantially more learners gaining qualifications in 2020 than is projected. For example, it requires 90 per cent of people having a Level 2 qualification and 68 per cent having a Level 3 instead of 77 per cent and 58 per cent respectively.

The coalition government is, however, reducing its adult FE and skills budget by 25 per cent over the three year period 2011–12 to 2013–14. This will result in changes to public subsidies to companies and individual learners. Under the previous Labour government there were subsidies to companies to train their workforce through Train to Gain as well as individual entitlements to free learning for those with low level or no qualifications. The coalition government is phasing out Train to Gain with some of the funding transferred to programmes such as apprenticeships and support for small- and medium-sized companies. Train to Gain was a national skills brokerage service helping employers of all sizes and sectors to get advice and support for the training they need to succeed delivered through Business Links. It offered government subsidies to employers to train certain employees to specified qualification levels. About a million learning opportunities have been funded through the programme.

## Skills entitlements

The previous government introduced entitlements to fully subsidised learning for young people without a first Level 3 qualification and for 24+ learners without a first Level 2 qualification (see pages 83–85 for the types of qualification under these levels). The coalition government is, however, changing some of these entitlements in 2012–13. There will be no change in the position of young people aged 19–23 in respect of fully funding their Skills for Life and first Level 2 and Level 3 courses. But there will be changes in respect to those aged 24+. They will still be entitled to fully funded Skills for Life but they will be expected to contribute to the cost of all other learning. Such co-funding involves, in the majority of cases, individuals paying 50 per cent of the fees with the exception of adult apprenticeships when the employer is expected to pay half the cost. In the year 2013–14 there will further changes with the partial subsidy being replaced by loans for those aged 24+ to pay the full cost of courses at Level 3 and above. The level of loan for apprenticeships and work-based learning will be half of the maximum loan available, with the employers expected to pay half the cost.

### *New skills entitlement/funding framework for 2012–13*

Learning Level	Priority population groups and government subsidy for learning they can expect		
	<i>Individuals aged 19 up to 24</i>	<i>Individuals aged 24+</i>	<i>Individuals who are unemployed and on active benefits</i>
Skills for Life	Fully funded	Fully funded	Fully funded
Level 2 (first)	Fully funded	Co-funded	Fully funded targeted provision for learners with skills barriers to employment
Level 2 (retraining)	Co-funded	Co-funded	
Level 3 (first)	Fully funded	Co-funded	
Level 3 (retraining)	Co-funded	Co-funded	
Level 4 (any)	Co-funded	Co-funded	

## Retraining and upskilling

As more and more workers experience the effects of the economic downturn, there is an urgent need for union reps – and ULRs in particular – to press the case for employers to invest in skills and training in order for companies to be better placed to come out of recession. Reskilling and upskilling will also be essential for jobs in the new growth sectors when there is an upturn in the economy.

Low paid workers in secure employment are most at risk. When a redundancy situation occurs, retraining to re-skill members to take up opportunities within or outside of the organisation is often presented as part of a redundancy/redeployment package. In reality, this option is rarely exercised. Negotiations can make all the difference in ensuring such redeployment/retraining opportunities are a realistic prospect. Negotiations can ensure that retraining opportunities are accessible and affordable. They should also be of a quality and standard to help members gain skills and qualifications necessary to find other jobs, either within or outside the organisation.

Public funds and resources are available to organisations in redundancy situations. In a redundancy situation, Jobcentre Plus should contact the company to outline the assistance available in that area. This will usually include an offer of 'free training' where more than 500 redundancies are foreseen. For sites where fewer redundancies are expected, the local information, advice and guidance service can offer more limited assistance.

### Emergency Learning in Derby

The use of technology allows unions to act as rapid learning response units, moving quickly in cases where their members are being threatened with redundancy.

When Bemrose Booth, a printing company in Derby went into receivership last year, the union Unite moved quickly to offer support to the 160 made redundant, by holding

an open day for members to provide advice on benefits and careers. Laptops were scrambled and a learning unit was set up at Unite's office in the city. Courses in literacy, numeracy and ICT were put on and all the learners gained a qualification. Classes on tips on writing CVs and job applications were set up.

One union member said: "It was a great way to brush up on ICT, maths and English while keeping in touch with mates and sharing information about jobs."

### A support package for retraining and upskilling

Each employee should be given time off for members to attend the following courses:

- information, advice and guidance (IAG) provision
- one-to-one advice/consultation session with ULRs
- a Skills for Life assessment carried out by someone qualified in Skills for Life, usually a member of the local college staff
- Skills for Life courses, leading to national literacy and numeracy tests at Levels 1 and 2 and the national entry-level Certificate in Adult Literacy provided by the local college, U-Net or other learndirect provision
- access to 'fast track' Skills for Life qualifications
- IT courses (introductory and intermediary), e.g. ITQ, CLAIT/ECDL/PC Passport
- CV writing, letter writing and interview techniques
- job search techniques
- various bespoke vocational courses – which often relate to the local job market, e.g. customer care or business improvement techniques.

Companies sometimes provide an 'in-house' package of training/advice for staff in a redundancy situation. However, the majority of the proposed packages listed above can only be delivered by recognised providers i.e. colleges. If members are to gain recognised qualifications/accreditation and access the funding which enables 'free provision', colleges need to be

involved. Where sites already work with a partner college, this college will often be the first port of call.

## Skills for Life

Skills for Life includes literacy, numeracy and English for Speakers of Other Languages (ESOL) programmes. These courses are termed Adult Basic Skills and lead to the following approved qualifications: Certificate in Adult Literacy, Certificate in Adult Numeracy and Certificate in English for Speakers of Other Languages–Skills for Life. The provision covers Entry Levels 1–3, Level 1 and Level 2. Learner achievements at Level 1 in literacy and Entry Level 3 in numeracy are currently counted towards the government’s targets for improving basic skills levels. Funding from the Skills Funding Agency is available for these courses at all levels from Entry 1, Entry 2 through to Entry 3 to Levels 1 and 2. ESOL for Work are a new range of ESOL qualifications which do not form part of Skills for Life and are funded in a different way. Skills Funding Agency funding was changed in 2010–11 introducing some restrictions for learners at the higher levels along the following lines.

- Adult Basic Skills literacy and numeracy courses are fully funded for learners who, regardless of previous educational attainment and following approved assessments and diagnostics, need to move up a full level. This means that learners who don’t have substantial needs, but are just below Level 2 in literacy or numeracy will still be entitled to free tuition but the provider may not draw down Skills Funding Agency funding. There will also be a cost for the certification. This new rule affects ‘brush up’ learners who do not have a majority of learning needs at Level 1 and below.
- Currently Skills for Life ESOL is partially subsidised with tuition fees of 47.5 per cent.
- ESOL for Work is subsidised on the same basis as Skills for Life ESOL.

Low paid workers in receipt of working tax credits retain the free entitlement. If an employee not in receipt of working tax credits

can provide other evidence of low pay (such as payslips, P60s and other tax forms) they may be able to access providers' discretionary Learner Support Hardship Funds. Other workplace learners or their employers would have to meet the cost of course fees. The TUC has argued against these changes on the grounds that they will restrict ESOL opportunities to such workers.

### From August 2011–2014

- ESOL – there will be no public funding for ESOL in the workplace and employers are expected to pay
- Other ESOL provision is directed to those from settled communities. Full funding is directed to those on active benefits (JSA and ESA work related activity group) ie those who are actively seeking employment. Others from settled communities will be co-funded.
- Literacy and numeracy provision will be free to the learner if they can move up a full level, but the uplift disappears with the exception of Numeracy Entry Levels.

### *Further information*

[www.unionlearn.org.uk/files/publications/documents/105.pdf](http://www.unionlearn.org.uk/files/publications/documents/105.pdf)

[www.unionlearn.org.uk/extrasUL/skills/SfLtoolkit.pdf](http://www.unionlearn.org.uk/extrasUL/skills/SfLtoolkit.pdf)

### *ULR bus worker is driving learning in the community*

Sanat Gurung, a Nepalese bus driver at First Centrewest's Greenford bus depot felt motivated by the work undertaken by Everton Herbert, the Unite ULR, who was successfully delivering workplace learning opportunities for employees. Sanat was so inspired that he enquired as to how that engagement could be replicated within the Nepalese community to address their specific learning needs.

Sanat is the secretary for the Thanti Nepali Sarmaj Community, which has around 6,000 members within the West London region. One of the biggest challenges in the Nepalese community is that a large portion of the women

within this community are housewives and despite having lived in the UK for a considerable number of years, they have yet to learn English, leaving them feeling socially excluded.

Sanat and Everton discussed how, with the assistance of the trade union, they could tackle the issues identified using the expertise of ULRs within the community. It was agreed that they would work towards delivering a community learning project aimed at addressing Skills for Life, active citizenship and professional development needs.

A learning centre based in Northolt West London was chosen as the location for classes to take place, and after two months there were over 120 members enrolled on courses, of which 50 of them have started ESOL courses.

## Digital inclusion

As many as 9.2 million adults in the UK have never accessed the Internet and the vast majority of those people are also socially excluded – older adults, those in low paid jobs or unemployed. They are unable to enjoy the benefits of being online that the rest of us take for granted – shopping, paying bills online and saving money, social networking and finding information you need. Over 90 per cent of jobs in today's world require at least basic internet skills. The government want unions and ULRs to play a big role in getting those people online and developing their ICT skills.

Unionlearn has launched a campaign called 'Go online: Get a lifeline'. It is working in partnership with UK Online, the BBC and Martha Lane Fox's Race Online 2012. UK Online (through Online Basics), and the BBC (through First Click and Webwise) have good learning packages targeted at the least confident adults, giving them the skills to use a mouse and surf the web and then take follow-on modules to build on the basics. ULRs can play a key role in reaching those people. Martha Lane Fox is the UK's Digital Champion and is passionate about reaching out to those socially and digitally excluded adults to get them online. Race

Online is building a network of Digital Champions committed to getting their family and friends online. Race Online is working with unionlearn to find employers willing to sign the Race Online pledge to ensure no employee leaves the workforce without being given the opportunity to acquire at least basic ICT skills.

### Apprenticeships

Apprenticeships have historically been 'union business' as unions have long recognised the need to recruit and organise young people. Apprenticeships have seen a renaissance in recent years as successive governments have prioritised investment in skills and training, with a particular focus on funding apprenticeship training. Expanding adult apprenticeships (i.e. for people aged 19+) is the centrepiece of the coalition government's skills strategy with a commitment to increase the number by 75,000 resulting in 200,000 people starting an apprenticeship each year by 2014–15. The Skills Strategy emphasises the need for unions and ULRs to work with employers to increase the number of high quality apprenticeship places available; in particular by promoting their benefits to disadvantaged groups in the workforce and to employers who have not previously trained apprentices. Unionlearn is thus working with affiliated unions to raise awareness of apprenticeship issues, both in terms of encouraging employers to recruit apprentices and offering training and resources to reps in order to give them the tools they need to support existing apprentices in their workplaces.

### Negotiating and bargaining on apprentices

Negotiators and reps need to get apprenticeships on the bargaining agenda. Apprenticeships span all areas of union activity from recruitment and organising, to pay bargaining, to learning and skills, to equality and diversity and to health and safety. Unions will have their own approaches to bargaining on apprenticeships. Some will include apprenticeships in learning agreements, some will draw up specific apprenticeship agreements, some will treat apprentices like any other category of worker. Below are some suggestions of key points on

apprenticeships that reps and negotiators may find useful when entering into negotiations which cover apprentices.

### ***No job substitution***

Unions should negotiate to ensure that apprentices are not used for job substitution, and that they are recruited to fill genuine skills shortages and plan for future skills gaps.

### ***Contract of employment***

Apprentices are employees and should have contracts of employment for at least the duration of the training period. Ideally an apprenticeship should lead to a guaranteed job. In some industries, short-term contracts are the norm and the union can play a role in supporting newly-qualified apprentices in getting their first full job. Unions and employers can help apprentices to improve their chances of getting a job by offering guaranteed interviews to apprentices or by offering training and support on CV writing skills and interview skills.

### ***Access to a trade union***

Apprentices are often young people with little experience of the world of work or of trade unions. Union reps should negotiate with employers to make sure that the union has the opportunity to engage with apprentices when they start work. Reps should also encourage other union members to tell apprentices why it is important for them to join the union.

### ***Mentoring***

Mentoring is particularly important for apprentices as they are often young people entering the workplace for the first time. The mentor relationship provides additional support, guidance, and pastoral care which is removed from the apprentice's direct line management chain. A mentor should be someone from outside the apprentice's reporting hierarchy at work. A ULR or workplace rep are often well placed to mentor apprentices. It is essential that issues discussed between mentor and mentee are kept confidential.

### *Pay*

At present in England, apprentices over the age of 19 are entitled to the National Minimum Wage after they have completed the first 12 months of their apprenticeship.

The minimum rate for those apprentices who are currently exempt is £2.50 per hour. This should include payment for time spent training off the job. The new Minimum Wage entitlement for apprentices also covers Wales, Northern Ireland and Scotland.

Apprentice rates should reflect the job done; if an apprentice does a full job they should be paid for it, or quickly progress incrementally to that point. If percentage rates are negotiated, they should start as high as possible and progress by time served or milestones or competencies achieved, rather than by age. In industries such as construction with nationally agreed apprentice pay, unions should ensure the local employer is complying with that agreement. The average weekly pay for apprentices was £170 per week in 2007 (when the last detailed survey of apprentice pay was carried out).

### *Union learning reps*

ULRs should work closely with the senior steward in a workplace and it could be appropriate for a ULR to undertake a mentoring role within the apprenticeship system. If there aren't already ULRs in the workplace, the introduction and support of apprentices would be a good opportunity to recruit learning reps.

### *Training and study*

Union negotiators will want to ensure that apprenticeship programmes in their workplace identify a clear programme of training including sufficient time spent off the job, such as in college, in dedicated training centres at the workplace, or in private study. The amount of time spent in college varies from one apprenticeship framework to another and from one employer to another. Some frameworks typically involve one day's release per week to attend college, others as little as half a

day per fortnight. Some colleges send tutors to the workplace so much of the learning takes place at work.

### *Equality and diversity*

A good apprenticeship programme should include strategies to ensure that apprenticeships are accessible to the widest possible demographic. In 2008–9 the proportion of apprenticeships started by women had increased to 50 per cent following the expansion of apprenticeships from traditional craft apprenticeships to a wider range of occupations. However, women are under-represented in sectors such as construction and engineering which tend to have better pay and prospects than the apprenticeships which are predominantly female such as hairdressing and early years' care.

Only six per cent of those starting an apprenticeship are from ethnic minorities even though they make up nine per cent of the population.

Evidence suggests that disabled young people are not receiving information about opportunities in work-based learning and apprenticeships, and that the information received on further education options is often negative.

Unions have a crucial role to play in redressing this balance and ensuring that women, disabled people, ethnic minorities and other disadvantaged groups are not discouraged from taking up apprenticeship opportunities.

Trade union reps and officers are crucial to supporting apprentices in the workplace. Unionlearn runs an 'Apprenticeships are Union Business' project that supports affiliate unions through regional workshops, courses for reps, guides for apprentices on their rights at work as well as a toolkit to negotiate with employers and to support apprentices at work. More information can be found at [www.unionlearn.org.uk/apprentices](http://www.unionlearn.org.uk/apprentices) or by emailing [apprentices@tuc.org.uk](mailto:apprentices@tuc.org.uk)

### *Apprenticeship advocate at Bury Council*

Historically, Bury Council had not actively engaged with the apprenticeship agenda in a coordinated way. However, this recently changed when the council supported eleven 'not in education, employment or training' (NEET) young people earlier this year, with an aim to progressing them on to an apprenticeship scheme.

Roger Pakeman, UNISON shop steward at the council, has been engaged in the apprenticeship agenda for some considerable time. As his union's representative on the steering group for introducing apprenticeships and work experience to the council, Roger is a perfect apprenticeship ambassador. Roger has actively worked with the council on their proposed work experience framework, which focuses on providing young people with work-based learning opportunities. It also helps identify talented young people from work experience schemes to generate talent pools, as well as up-skilling the young people in Bury to meet future workforce demands.

Roger says: "I am enthusiastic about apprenticeships and I want them to be recruited into all areas of Council work, not just business administration roles within an office setting. I also want to ensure that apprentices are aware of the valuable role trade unions can play in supporting and guiding them through the world of work."

## Green skills

Green skills is an ‘umbrella term’ for a very broad range of occupational and more general skills and knowledge that contribute to improving the environment and tackling climate change. Very few ‘green skills’ are completely new, they are mostly skills that we already have but need to be updated for the challenge of climate change (e.g. construction-related skills) or replenished because they are being lost to retirement (e.g. engineering skills). Industries must make steep savings on energy and resource usage and cut pollution to meet the challenges of the age. So every workplace will be affected, making important changes to working practices a necessity. An ‘environmentally literate’ workforce will be important in driving this process of industrial change.

### *FBU environmental champions at Avon Fire & Rescue*

The greening of Avon Fire Service is a good example of employers working with trade unions to the benefit of both. Working together, the entire service has had a green audit from top to bottom. The brigade is working closely with the FBU union to tackle climate change. Simon Richards, the service’s environmental and energy improvement co-ordinator says: “We want to cut out carbon emissions by 30 per cent and environmental champions are key to our success because working with the FBU has enabled us to access funds to deliver training, raise the profile of these issues amongst our staff and maintain momentum on our actions.” The environmental champions provide meter readings to help measure the carbon footprint every week so that targets can be set. It also helps with the budget because it focuses on how much the service is spending and how much it can save.

Unionlearn has created a page on its website for those interested in green skills issues. There are a number of

'environmental awareness' courses being offered by TUC affiliates and their partners and in some unionlearn regions.

Trade unions have also created a new role of 'green rep' to help co-ordinate environmental projects in the workplace.

[www.tuc.org.uk/workplace/index.cfm?mins=87&minors=4&majorsubjectID=2](http://www.tuc.org.uk/workplace/index.cfm?mins=87&minors=4&majorsubjectID=2)

Unionlearn has published 'Greener Deals' on the website which has a number of practical ideas as to how union reps can make their workplace greener.

### Higher level skills

As many as 27 per cent of the adult population now have a degree and above. But this will have to increase substantially as the economy's demand for higher skills increases up to 2020.

Managers, senior officials and professional/technical occupations will represent the largest total demand for new workers and replacement of existing jobs.

Some employers provide support for employees wishing to take higher learning courses. This support can often be limited to people of certain grades within the company e.g. management, engineers etc and are often related to the skills needs of the company or have some relationship to the roles of individuals.

Members may wish to take higher education courses for a variety of reasons, such as enhancing their career prospects, a complete change of career path or simply because they are interested in a particular subject. In these circumstances employers may be reluctant to support members unless they can prove that the intended course is related to the skills the company need or may need in the future. If no assistance is available it may be up to the individual to fund their own course of study on either a full-time or part-time basis.

Unionlearn is very much involved in helping



The Open University

unions get their members into higher education and continuing professional development (CPD). It has agreed memorandums of understanding with the Open University, higher education institutions and the National Extension College (NEC). These involve discounts for union members (see page 88).

Unionlearn has worked with Aimhigher to open up progression routes for union members wishing to obtain higher level qualifications. Aimhigher was a government programme designed to raise the aspirations and attainment of non-traditional groups so that they gain the academic or vocational qualifications to enter higher education. The framework for higher education qualifications is set out on page 86.

Unions are also forming union learning clubs to support mainly higher level learners. They help individuals in workplaces who are studying and who have access to additional study skills support. Colleagues at work support each other in learning and gain support from their ULR. The clubs help learners to share experiences and work through problems together, either with colleagues at the workplace or with other learners on university web forums.

Help for ULRs includes the ULR training module, Supporting Learners into Higher Education (see page 56) and the higher learning theme on the unionlearn Climbing Frame (see page 39).

There is now a work-based route to higher qualifications. Foundation degrees are higher education qualifications introduced by the government in September 2001 to upskill the UK workforce. They are degree level qualifications (Level 4/5) designed with employers, which usually take two years to complete full-time (part-time could take up to four years), that combine academic study with workplace learning to equip people with the relevant knowledge, understanding and skills to improve performance and career opportunities.

### *Higher learning for health workers*

Hillingdon Hospital Trust signed a learning agreement in September 2008 between senior management and Unison. The Trust agreed to offer foundation degrees in health and social care long-term conditions. Eight learners who were either support workers from occupational therapy or physiotherapy and health care assistants from nursing signed up to the degree course as part of a Pan-London Skills for Health work-based learning project. The project was funded by the Union Learning Fund.

Thames Valley University was chosen as the provider after a thorough selection process and interview by the steering group which included a potential student, signifying a clear commitment to achieving a partnership approach. Funding for the course was provided by NHS London.

As well as having an excellent career development opportunity the learners are now being allocated higher competency tasks within the profession. Many of the learners aspire to undertake a BSc Honours and others will be given the opportunity to be appointed to a higher employment post.

### **Higher Learning at Work Micro Site**

The site has been set up to help progression at work. It is useful for union members, reps and working adults interested in progression to higher learning, including apprentices. The site provides a range of resources and materials for union reps and learners including:

- What is higher learning?
- What opportunities are available?
- What is the Open University?
- What are Foundation Degrees?
- Is higher learning suitable for me?
- How can I make a decision?

- How do I apply?
- How can I fund my learning?
- What support can my employer give?
- How can I make a case for support for learning at work?
- What have other working people done?

### ***Further information***

- *Supporting Union Learners in Higher Learning: a toolkit for union learning reps*
- *Navigating the Union Learner Journey: a stakeholder route plan to help union learners engage successfully with higher level learning*
- *Higher Education at Work: Making the case to employers. A guide for trade union reps*

Available from unionlearn publications,  
[www.unionlearn.org.uk/publications](http://www.unionlearn.org.uk/publications)  
[www.higherlearningatwork.org](http://www.higherlearningatwork.org)

## **Continuing professional development**

Some unions have a specific interest and responsibility for continuing professional development (CPD). Some professions require qualifications in the appropriate field at least to Level 4 for entry into the profession. Examples of this are teaching, professionals allied to medicine such as radiographers, podiatrists and scientists to name a few. A further requirement of continuing to practice is that individuals must update their knowledge and skills to meet changes and developments in their field – sometimes aligned to developments in technology or reflecting new research or other developments. Union experience is that there is not always effective access to CPD for part-timers, freelancers, women returners or rurally located people. Unions and their ULRs have been developing their role to influence how CPD is developed and offered to make it more effective for all their members.

### *Opening CPD for teachers*

ATL and Edge Hill University have established a unique partnership. All ATL members have access to Edge Hill University's flexible accreditation programmes, largely free of charge and online. ATL members have the opportunity to undertake a variety of accredited activities at postgraduate level, and there are also routes through to Qualified Teacher Status for those without a formal teaching qualification. They are able to complete their degree mainly through 'naturally occurring evidence' from the workplace, and can access modules and accreditation by attending ATL courses, Edge Hill modules or workplace projects. Degrees can be completed in manageable chunks and studying via Edge Hill also shows an engagement with CPD for performance management purposes. For staff with a first degree, accreditation is available at postgraduate level, up to and including a MA in Education. Edge Hill's accreditation routes are designed to be flexible, innovative and focussed on impact in the workplace. The union also runs courses on CPD organised by ULRs at a local level such as managing challenging behaviour, underachievement in boys and voice care.

### **Informal adult and community learning**

Informal adult and community learning (IACL) is learning for its intrinsic value – not necessarily involving assessment and leading to a qualification. It can make a huge contribution to the well-being of individuals and brings people together across communities. It is the learning that people get involved in for its own sake, and not primarily to get a qualification or to get on at work. That is not to say that learning which starts off informally, or on a small scale, might not lead on to other things. Many people have taken up a new leisure interest or started to learn a new skill in an informal way and have ended up using that skill to start their own business or move into a new career. IACL takes place in many different settings, covers many different topics and can develop many different skills.

***Settings***

Museums, libraries, workplaces, churches, synagogues, mosques, temples, community centres, school halls, parks, sports fields, countryside, arts centres, care homes, health centres, broadcast media, online.

***Activities***

Physical fitness, mental well-being, art, craft, music, understanding and care of the environment, faith and values, history and culture, community development.

***Skills***

Painting a watercolour; making a mosaic; singing in part; working together in a group; improving memory; speaking with confidence; listening to others; assertiveness; organising a campaign; using tools; making a broadcast; using a digital camera; swimming; balance; tracing your family tree; budgeting.

All sorts of individuals and organisations help to make IACL happen across the country. Some of these individuals are paid but others are volunteers. Some key organisations are part of national or local government but many are not. Voluntary organisations and community networks underpin much informal adult learning across the UK. Trade unions have always recognised the importance of IACL in transforming individuals' lives through building confidence and self-fulfilment. Many non-traditional learners who take up such learning build up the confidence to progress into more formal learning including work-based training. ULRs report that many learners are initially engaged in the learning process through IACL opportunities in the workplace. As they develop confidence, learners often progress successfully into learning such as Skills for Life or work-based vocational pathways.

ULRs and union reps can do much to encourage more employers to support such courses in trade union learning centres and by opening them up to family and friends and the local community as a whole. There are many examples of trade

unions promoting IACL to their members including:

- Employee development programmes – like the well-known Ford Employee Development Assistance Programme (EDAP)
- workplace libraries and book groups
- courses for personal development/interest run by colleges/adult education centres/WEA
- taster sessions attracting new learners
- visits or activities with museums/galleries/libraries/theatres
- courses and activities that develop knowledge and skills for citizenship and participation in society
- hobby/interest clubs
- supporting health, well-being and fitness through keep fit programmes, salsa dancing, scuba diving, boxing clubs, mental health awareness raising programmes
- developing potential musicians through providing guitar and drumming lessons
- promoting reading through Quick Reads and the Six Book Challenge
- promoting IACL at work during Adult Learners Week, Learning at Work Day, Celebration of Learning and open days at trade union learning centres.

Another key player in IACL is the community learning champion. They are enthusiasts who promote learning to friends, neighbours and people right across their communities. A national programme funded by BIS is showing how lives are changed when learning champions are given the resources, backed by effective support and training. As a result more people are getting involved in learning, more parents are raising their sights and those of their children, more people are shaking off the damaging effects of depression and drug abuse, more people are getting into work and more people getting involved in making their community a better place. Community learning champions are working with ULRs to promote learning in their neighbourhood.

### *ULRs and community learning champions working together*

Liverpool Neighbourhood Learning Champions in Merseyside and ULRs in Merseytravel, Merseyrail, Liverpool City, Sefton, Knowsley and Wirral councils, HMRC, Liverpool John Lennon Airport and Northern rail have developed a strong working partnership. They meet on a quarterly basis to share information and best practice in locations such as John Lennon Airport, Merseytravel, Merseyrail and Speke fire station learning centre. They jointly offer learning opportunities to the community as a whole as well as union members in Merseytravel. This collaboration is resulting in well-subscribed courses and a greater choice of subjects. They are also planning pathways into employment, with community groups delivering training to meet employer requirements to increase the pool of job-ready people. Community learning champions and ULRs are also planning a promotional day during Adult Learners' Week.

IACL is currently being reformed by the coalition government to:

- help build the 'Big Society', for example through learning for personal development, mental/physical health, digital inclusion, civic engagement, social cohesion and support for families.
- engage and motivate disadvantaged groups and create progression pathways towards the wider learning continuum, including skills-focused learning and employment.

### **Investors in People**

An important lever for increasing the quantity and quality of workplace learning is Investors in People. IIP is the national standard for developing people at work. It is a business improvement tool for changing the way organisations meet their business goals through the development and management of staff. IIP is a quality standard, assessed by independent assessors, that organisations use to develop and follow best practice. Organisations need to show that they have met the evidence requirements. An extended framework contains other

evidence requirements in order to stretch organisations to help them become high performing workplaces. Three additional grades of recognition (gold, silver and bronze) have been introduced to recognise levels of further achievement within this extended framework. IIP is awarded for a maximum of three years and organisations must be reassessed at any time in those three years if they wish to continue being recognised as Investors in People.

The IIP process can offer unions the opportunity to improve consultation with management over developing the organisation's business plan; helping to establish a joint agenda with the employer around learning; ensuring that the organisation's learning policy does not discriminate on grounds of gender, race, employment status; and supporting union members in the personal development process.



INVESTOR IN PEOPLE

### *Coast & Country Housing*

Coast & Country Housing is a registered social landlord responsible for the management of approximately 10,000 homes in the Redcar and Cleveland area. The housing stock was transferred to Coast & Country from the local council in July 2002 as a result of a large-scale voluntary transfer agreement, following a ballot of tenants. Coast & Country has worked closely with trade unions from its inception, with many of those 450 staff transferring from the council belonging to one of four trade unions: Unison, Unite, GMB and UCATT. The company formally committed to the achievement of Investors in People in April 2008 and has involved the unions in the process. The company was first assessed in the summer of 2009 when they were awarded the prestigious Investors in People Silver status, and were close to meeting the requirements for Gold status. The company now has a consistently applied approach to performance management, with all team members having one-to-one

discussions, appraisals and SMART targets agreed for the following year. As a result, staff feel they are being treated equally and are subject to the same standards. The company's staff satisfaction survey has also shown a significant rise with the number of staff reporting satisfaction increasing from 61 per cent in 2007 to 83 per cent in 2009. The appointment of a joint trade union secretary, David Rollings, with up to two days per week paid time off, has allowed unions to engage in a wide range of activities designed to improve the operation of the company. David Rollings says: "Trade unions played an active role in developing the new rewards and recognition schemes which acknowledge the difference people can make to the service we provide by just giving that little bit extra."

Working with the Investors in People framework has also enabled both the company and its trade union partners to develop a common understanding and approach towards the issue of skills and, in particular, apprenticeships. As an example, despite the adverse economic climate, both parties agree on the importance of maintaining the investment in apprentices as a platform for meeting the company's future skills needs but also in contributing to tackling the levels of unemployment and worklessness in the area.

### ***Further information***

*Making the Most of Investors in People: a guide for trade unions*

### Qualifications

You may hear people talking about qualification 'levels'. These levels are contained in three qualification frameworks:

- national qualifications framework
- qualifications and credit framework (the new framework for vocational, or work-related qualifications)
- framework for higher education qualifications.

Each framework groups together qualifications that place similar demands on the learner. However, within any one level, qualifications can cover a wide mix of subjects and take different amounts of time to complete. The frameworks can also help you see how one type of qualification can lead on to other higher levels of qualifications.

## National qualifications framework

The national qualifications framework (NQF) sets out the level at which a qualification can be recognised in England, Northern Ireland and Wales. Only qualifications that have been accredited by the three regulators for England, Wales and Northern Ireland can be included in the NQF. This ensures that all qualifications within the framework are of high quality, and meet the needs of learners and employers.

NQF level	Examples of qualifications	What they give you
Entry	<ul style="list-style-type: none"> <li>■ Entry level certificates</li> <li>■ English for Speakers of Other Languages (ESOL)</li> <li>■ Skills for Life</li> <li>■ Functional Skills at Entry Level (English, maths and ICT)</li> </ul>	<ul style="list-style-type: none"> <li>■ basic knowledge and skills</li> <li>■ ability to apply learning in everyday situations</li> <li>■ not geared towards specific occupation</li> </ul>
1	<ul style="list-style-type: none"> <li>■ GCSEs grades D–G</li> <li>■ BTEC introductory diplomas and certificates</li> <li>■ OCR nationals</li> <li>■ Key Skills Level 1</li> <li>■ NVQs at Level 1</li> <li>■ Skills for Life</li> </ul>	<ul style="list-style-type: none"> <li>■ basic knowledge and skills</li> <li>■ ability to apply learning with guidance or supervision</li> <li>■ may be linked to job competence</li> </ul>
2	<ul style="list-style-type: none"> <li>■ GCSEs grades A*–C</li> <li>■ BTEC first diplomas and certificates</li> <li>■ OCR nationals</li> <li>■ Key Skills Level 2</li> <li>■ NVQs at Level 2</li> <li>■ Skills for Life</li> </ul>	<ul style="list-style-type: none"> <li>■ good knowledge and understanding of a subject</li> <li>■ ability to perform variety of tasks with some guidance or supervision</li> <li>■ appropriate for many job roles</li> </ul>

NQF level	Examples of qualifications	What they give you
3	<ul style="list-style-type: none"> <li>■ A levels</li> <li>■ GCE in applied subjects</li> <li>■ International Baccalaureate</li> <li>■ Key Skills Level 3</li> <li>■ NVQs at Level 3</li> <li>■ BTEC diplomas, certificates and awards</li> <li>■ BTEC nationals</li> <li>■ OCR nationals</li> </ul>	<ul style="list-style-type: none"> <li>■ ability to gain or apply a range of knowledge, skills and understanding, at a detailed level</li> <li>■ appropriate if you plan to go to university, work independently, or (in some cases) supervise and train others in their field of work</li> </ul>
4	<ul style="list-style-type: none"> <li>■ NVQs at Level 4</li> <li>■ BTEC professional diplomas, certificates and awards</li> </ul>	<ul style="list-style-type: none"> <li>■ specialist learning, involving detailed analysis of a high level of information and knowledge in an area of work or study</li> <li>■ appropriate for people working in technical and professional jobs, and/or managing and developing others</li> </ul>
5	<ul style="list-style-type: none"> <li>■ HNCs and HNDs</li> <li>■ NVQs at Level 5</li> <li>■ BTEC professional diplomas, certificates and awards</li> </ul>	<ul style="list-style-type: none"> <li>■ ability to increase the depth of knowledge and understanding of an area of work or study, so you can respond to complex problems and situations</li> <li>■ involves high level of work expertise and competence in managing and training others</li> <li>■ appropriate for people working as higher grade technicians, professionals or managers</li> </ul>

NQF level	Examples of qualifications	What they give you
6	<ul style="list-style-type: none"> <li>■ National diploma in professional production skills</li> <li>■ BTEC advanced professional diplomas, certificates and awards</li> </ul>	<ul style="list-style-type: none"> <li>■ a specialist, high-level knowledge of an area of work or study, to enable you to use your own ideas and research in response to complex problems and situations</li> <li>■ appropriate for people working as knowledge-based professionals or in professional management positions</li> </ul>
7	<ul style="list-style-type: none"> <li>■ Diploma in translation</li> <li>■ BTEC advanced professional diplomas, certificates and awards</li> </ul>	<ul style="list-style-type: none"> <li>■ highly developed and complex levels of knowledge, enabling you to develop original responses to complicated and unpredictable problems and situations</li> <li>■ appropriate for senior professionals and managers</li> </ul>
8	<ul style="list-style-type: none"> <li>■ specialist awards</li> </ul>	<ul style="list-style-type: none"> <li>■ opportunity to develop new and creative approaches that extend or redefine existing knowledge or professional practice</li> <li>■ appropriate for leading experts or practitioners in a particular field</li> </ul>

### Qualifications and Credit Framework

The qualifications and credit framework (QCF) is a new framework for vocational (or work-related) qualifications. It contains a new type of vocational qualification, available in England, Wales and Northern Ireland. These new vocational qualifications are made up of units that are worth credits. You can study units at your own pace and build these up to full qualifications of different sizes over time. Units and qualifications also range in difficulty, from Entry Level to Level 8 (similar to the levels in the NQF). There are already lots of these new vocational qualifications available, and more will be added to the framework.

### Framework for Higher Education Qualifications

The framework for higher education qualifications (FHEQ) has been designed by the higher education sector, and describes all the main higher education qualifications. It applies to degrees, diplomas, certificates and other academic awards granted by a university or higher education college (apart from honorary degrees and higher doctorates). The FHEQ broadly corresponds with Levels 4 to 8 of the national qualifications framework, in terms of the demands the qualifications place on learners.

FHEQ level	Examples of qualifications
4	<ul style="list-style-type: none"> <li>■ certificates of higher education</li> </ul>
5	<ul style="list-style-type: none"> <li>■ foundation degrees</li> <li>■ diplomas of higher education</li> <li>■ higher national diplomas</li> </ul>
6	<ul style="list-style-type: none"> <li>■ bachelors degrees</li> <li>■ bachelors degrees with honours</li> <li>■ graduate certificates and graduate diplomas</li> <li>■ professional/graduate certificate in education</li> </ul>
7	<ul style="list-style-type: none"> <li>■ masters degrees</li> <li>■ integrated masters degrees</li> <li>■ postgraduate certificates</li> <li>■ postgraduate diplomas</li> </ul>
8	<ul style="list-style-type: none"> <li>■ doctorates</li> </ul>



Lorrie Campbell / Guzelian

## Section 6

# Funding learners

There are a number of sources of funding for courses for adult learners which ULRs could signpost union members to.

### ***Adult Learning Grant***

An ALG can pay a learner up to £30 a week during term time whilst taking a first full-time course (an average of 12 hours a week), including BTECs, NVQs, GCSEs and A Levels. The amount will depend on total income the previous tax year. For example, if income is up to £11,810 then the weekly payment is the maximum of £30 but people with an income over £19,513 are not eligible. If a learner has a live-in partner then he/she will be eligible to the £30 if the combined income is up to £30,810. Learners with a combined income of over £30,810 would not be eligible. The ALG can be paid for up to two years but can be extended if the learner is studying for a first full Level 2 qualification and going straight on to a first full Level 3 qualification and is expected to complete the learning within three years. Application packs can be obtained by logging on to

[https://learnersupport.direct.gov.uk/algapplication.htm?PRO=alg\\_request](https://learnersupport.direct.gov.uk/algapplication.htm?PRO=alg_request)

### ***Discretionary Support Funds***

The funds are available in colleges to help with learning costs and are prioritised for those who face financial hardship. They can be used to help with:

- financial hardship and emergencies
- childcare costs (for Ofsted-registered childcare)
- accommodation costs for those who have to study further than the maximum distance from home
- essential course-related equipment, materials and field trips
- travel costs for over 18s.

To be eligible to apply learners must have been accepted onto, and be studying, a programme of learning funded by the Learning and Skills Council. Colleges determine priority groups and maximum amounts they award. Common priority groups are:

- students who are economically disadvantaged (such as those on a low income or receiving benefits)

- those aged over 19 who don't have a Level 2 qualification
- students who have been in care or on probation, young parents and others considered 'at risk'

### *Union discounted courses*

For union members who are paying their own study fees, unionlearn has negotiated a 10 per cent discount on the first OU course studied. The offer applies to all Level 1 courses worth 30 or 60 points. For further information telephone 0845 300 60 90 – quote reference 'union' or log into [www.openuniversity.co.uk/unionlearn](http://www.openuniversity.co.uk/unionlearn).

Following the agreement with unionlearn, all union members also receive a 10 per cent discount on any National Extension College home study course. For details of all courses log on to [www.nec.ac.uk/courses](http://www.nec.ac.uk/courses) or telephone 0800 389 2839.

### *Professional and Career Development Loan*

A Professional and Career Development Loan is a bank loan. You make an agreement with a participating bank to borrow an amount between £300 and £10,000. Then once you have stopped studying, you pay it back in the normal way. The difference with a Professional and Career Development Loan is that the Young People's Learning Agency pays the interest on the loan while you are studying – and for one month afterwards. After this, you will pay interest at the rate fixed when you took out the loan. Interest rates on the loans are set so they are competitive with other 'unsecured' personal loans that are commercially available. Banks offer Professional and Career Development Loans at a reduced customer rate. However, interest rates may vary from bank to bank. For further information, consult the participating banks.

The loan can help to fund a wide range of courses lasting up to two years (or three years, if the course includes a year of work experience). The course doesn't necessarily have to lead to a qualification, but it must be one that will help with your career such as:

- a postgraduate course, like a masters
- technical or management training
- a professional qualification
- a course at your local college or learning provider
- an additional bachelors degree (if you are already a graduate).

You can use a Professional and Career Development Loan to help with:

- course fees (up to 80 per cent of the total – or up to 100 per cent if you have been unemployed for three months)
- other course costs, like books, travel and childcare
- living expenses, like rent, food and clothing (if you are unemployed or working less than 30 hours per week).

Professional and Career Development Loans are intended to help with costs that are not covered by other sources of public funding. For example, you could not get one if you are planning to study full-time for a first degree (because there is a separate package of student loans available). However, if your costs are only partly covered you may be able to ‘top up’ the funding with a Professional and Career Development Loan. For example, if you are getting a grant for your course fees, you could apply for a loan to help with your living costs.





Simon Weller

## Section 7

# Further information

**Accreditation of Prior Learning**

a means of crediting people for achievements, skills and knowledge that they have already gained. Credit is awarded for learning that can be demonstrated through providing evidence.

**Adult Learners' Week**

promotes all forms of adult learning. During the week organisations run special activities. Unions and ULRs are very involved in its Learning at Work day, which aims to give the workforce the opportunity to learn something new.

**Adult Learning Grant**

helps adults studying full-time with the costs of learning. The grant pays up to £30 per week (subject to financial assessment) for full-time learners aged 19 and over who are studying for their first full Level 2 or full Level 3 qualification.

**Alliance of Sector Skills Councils**

national and regional network of the 25 sector skills councils (see SSCs)

**Apprenticeships**

programmes that allow mainly 16–18 year olds to learn on the job, while building up skills and gaining qualifications. Union reps and ULRs are involved in supporting apprentices. Apprenticeships lead to an NVQ Level 2. Advanced apprenticeships last for at least two years and lead to a NVQ at Level 3, relevant key skills qualifications and a technical certificate. There are also adult apprenticeships for those aged 19+.

### **Access course**

designed to prepare mature students without other qualifications for entry into university or college to do a degree or higher diploma course.

### **ATA**

Apprenticeship Training Agency which acts as an employment agency for apprentices and outsources the training.

### **Awarding body**

develops and publishes accreditation criteria and accredits qualifications. The major awarding body for TUC Education qualifications is NOCN (the National Open College Network).

### **Basic Skills**

see Skills for Life

### **BIS**

Department for Business, Innovation and Skills responsible for further education, skills and higher education. Responsibility for 16–19 education has transferred to local authorities.

### **Campaign for Learning**

a national charity which aims to create a passion for learning that sustains people for life. Organises Learning at Work Day which is run by unionlearn and ULRs at the workplace (see Adult Learners' Week).

### **Climbing Frame**

The union learning Climbing Frame is a free website for union learning reps to help support learners and promote learning in the workplace. ULRs can make use of the wide range of information available within the Learning Themes and also use the Learner Management area of the website to store information from sessions with learners and help learners plan their learning journey.

**UK Commission for Employment and Skills**

government body with responsibilities across each of the four nations, and for skills at all levels. It does not have significant executive or operational functions. It has union representation and is primarily advisory, shaping strategy to achieve the government's world class ambitions, challenging all parties to raise their game on skills.

**Collective Learning Funds**

funding arrangements which aim to pool more resources into workplace learning, with the delivery of the provision jointly managed by the union and the employer. Models have been tested through a project run by unionlearn in the North West and East Midlands.

**Community learning champions**

enthusiasts who promote learning to friends, neighbours and people right across their communities. A national programme funded by BIS is showing how lives are changed when learning champions are given the resources, backed by effective support and training.

**CPD**

continuing professional development. Any process or activity that provides added value to the capability of the professional through the increase in knowledge, skills and personal qualities necessary for professional and technical duties.

**Digital divide**

the unequal access of certain groups in society to information and communications technology, leading to barriers to the acquisition of related skills. Unionlearn has a number of projects with partner colleges to narrow the digital divide.

**e-learning** covers a wide set of applications and processes, such as web-based learning, computer-based learning, virtual classrooms. It includes the delivery of content via internet, audio and videotape, satellite broadcast, interactive TV and CD-ROM.

**ECDL** European computer driving licence. Europe-wide qualification which enables learners to demonstrate their competence in computer skills.

**EQIA** equality impact assessment for all existing adult skills policies in respect to race, disability, gender and age.

**ESOL** English for Speakers of Other Languages. Unions broker these courses for migrant workers as well as ESOL learners from the longer settled communities,

### **Foundation degrees**

programmes designed and delivered by partnerships of employers, employer organisations, universities and colleges to develop technical knowledge and skills and wider employability skills. Equivalent to the first two years of an honours degree.

**GTAs** Group Training Associations are centres owned and shared by local employers to manage workforce training such as apprenticeships

### **High performance workplaces**

workplaces that involve employees in processes to achieve high levels of performance through increased autonomy, participation and learning.

**IAG** information, advice and guidance. Many ULRs provide front-line IAG on learning to their members.

**ICT** information, communication and technology courses many of which are taken by union learners either in learning centres or online.

**liP** Investors in People – the national standard which sets a level of good practice for training and development of people in the workplace.

### **Informal adult community learning**

informal learning is learning for its intrinsic value – not necessarily involving assessment and leading to a qualification. It covers learning for pleasure, leisure, personal development and active citizenship.

**ITB** industry training board – statutory bodies with union representation that promote and fund training through a levy on employers in the sector. At present there are two ITBs – both in the construction sector.

**ITQ** NVQ for IT users which demonstrates competence in the use of IT in the workplace.

### **Jobcentre Plus**

government agency which supports employers in their recruitment with labour market intelligence, provides advice on building a diverse workforce and in meeting their skill needs with the LSC. Provides support for individuals through personal advisers.

### **Learning agreement**

an agreement between a union and employer which might include elements such as paid time off to time off for study, establishing a learning centre and facilities and facility time for ULRs.

### **Learning committee**

a joint forum, which allows unions and employers to deliver and monitor the learning agreement.

### **Learning needs analysis**

an assessment of the training requirements of an organisation's workforce usually carried out by interviews and/or questionnaires.

### **learndirect**

UFI brand name for the delivery of online learning through national network of learning centres.

Unionlearn manages a network of union learning centres offering learndirect courses, particularly ICT and Skills for Life.

### **Lifelong learning**

all continuous learning after the age of 16.

### **Lifelong learning accounts**

are replacing Skills Accounts as an online tool to help individuals make decisions about their learning throughout their working life.

### **Local enterprise partnerships**

have replaced Regional Development Agencies and are locally owned partnerships between local authorities and businesses which are to determine local economic priorities and help to drive economic growth.

**Local learning partnerships**

local forums for co-ordinating the activities of local providers such as further education colleges.

**Matrix Standard**

a quality framework for the effective delivery of information, advice and/or guidance on learning and work. A number of union learning centres have obtained the award.

**MOU**

memorandums of understanding, which set out joint objectives and programmes of action. Unionlearn has signed them with a number of partners, e.g. the Open University.

**National Apprenticeship Service**

the NAS has responsibility for apprenticeships in England. It has been designed to increase the number of apprenticeship opportunities and provide a dedicated, responsive service for both employers and learners.

**National Occupational Standards**

statements of the skills, knowledge and understanding needed for an individual to meet the standards expected of them in employment. The standards are industry-led and developed by representatives of employment sectors and cover almost every occupation in the UK. They are also the basis for vocational qualifications and can be used for training, appraisal and recruitment.

**NQF**

the National Qualifications Framework sets out the level at which a qualification can be recognised in England, Northern Ireland and Wales.

- Next Step** the Next Step information and advice service provides free information on learning and work to anyone aged 20 or over.
- NIACE** National Institute of Adult Continuing Education – voluntary organisation which works closely with unionlearn in encouraging more adults from a wide range of backgrounds to take up all forms of learning.
- NOCN** National Open College Network – awarding body which provides national qualifications and programmes in a wide range of subject areas including TUC Education courses.
- NVQs** national vocational qualifications are work-based qualifications in England, Wales and Northern Ireland. People are assessed on the basis of their competence in defined tasks.
- Online learning**  
see e-learning.
- Ofsted** Office for Standards in Education – the regulatory authority which inspects all publicly funded education and training providers, including those delivering work-based training, further education, e-learning and adult and community-based learning.
- Paid educational leave**  
leave provided by employers during working time for their workforce to study at a local college or workplace learning centre.

**Professional and career development loans**

can be used for financing course fees and related costs provided courses are vocational and last no longer than 2 years. The loan is repaid once the course is completed at interest rates set by the bank.

**QCF**

the Qualifications and Credit Framework is a framework for vocational (or work-related) qualifications available in England, Wales and Northern Ireland. These vocational qualifications are made up of units that are worth credits. Learners can study units at their own pace and build these up to full qualifications of different sizes over time. TUC Education courses are within the framework.

**Quality Award**

is awarded by unionlearn to providers who demonstrate that union learners are considered in the design, development and delivery of courses and programmes. The award helps to signpost ULRs to union-friendly provision.

**Quick Reads**

short, exciting books by bestselling authors and celebrities for adults who are new to reading, have lost the reading habit, or who prefer a quick read. Unionlearn promotes the books through its learning centre network.

**Sector skills councils (SSCs)**

employer-led bodies with union representation established to increase opportunities to boost the skills of the workforce in the sector.

### **Sector skills agreements**

SSC agreements that map out what skills employers need for their workforce and how they are to be supplied. Trade unions are involved in drawing them up and helping to deliver them.

### **Skills Academies**

employer-driven centres of excellence delivering skills required by each major sector – first ones set up in 2007. They have close connections with SSCs in their sector.

### **Skills for Life**

Skills for Life is the government's national strategy for improving language, literacy and numeracy and includes ESOL (English for Speakers of Other Languages). ULRs are active in supporting Skills for Life learners.

### **Skills Funding Agency (SFA)**

an agency of the Department for Business, Innovation and Skills which funds and regulates adult further education and skills training in England.

**SMEs** small and medium-sized enterprises with less than 250 employees.

**SVQs** Scottish vocational qualifications – work based qualifications in Scotland modelled on NVQs.

### **Training levy**

levy on employers within a sector to fund training administered by an ITB.

**Ufi** University for Industry – the organisation behind learndirect and UK online.

**ULR** union learning representative – a representative whose role is promoting, brokering and helping to deliver learning at the workplace.

**ULR database**

database of ULR contact details held by unionlearn.

**U-Net**

the unionlearn network of learning centres that works with learndirect to offer online courses.

**unionlearn**

the TUC's learning organisation established in 2006 whose responsibility includes TUC Education, support for unions and their ULRs and the Union Learning Fund.

**unionlearn careers and advice service**

operated for unionlearn by learndirect as a free, impartial and confidential service. Its aim is to help union members to develop new skills, improve their job prospects or change jobs.

**Union learning centre**

established at a workplace, union office or college to provide learning facilities. Many union learning centres offer learndirect courses within the unionlearn network (see U-Net).

**Union learning club**

support mainly higher level learners who are studying and who have access to additional study skills support including that of their ULR. The clubs help learners sharing experiences and work through problems together, either with colleagues at workplace or with other learners on university web forums.

### **Union Learning Fund**

set up by the government in 1998 to fund union-led projects aimed at increasing union capacity in learning and skills. The fund supports £15.5m of union-led projects annually.

### **WEA**

Workers' Educational Association – runs about 10,000 courses a year for adult learners and works in partnership with unions to deliver workplace learning, particularly in the health service and in local government.

### **Workforce development**

learning activities that increase the capacity of individuals to participate effectively at the workplace.

### **Young People's Learning Agency (YPLA)**

an agency of the Department for Education whose responsibilities include funding learning opportunities for 16–19 year olds.

## Free unionlearn resources

ULRs and unions can order a range of unionlearn products and materials from partner organisations at:

[www.unionlearn.org.uk/freebooks](http://www.unionlearn.org.uk/freebooks). All items are free of charge, with postage and packing free as well. You can order the latest DVDs, posters, leaflets, booklets and promotional materials.

All the publications mentioned here are available on the unionlearn website at [www.unionlearn.org.uk/publications](http://www.unionlearn.org.uk/publications). You can order copies to be sent by post, or you can download them. And don't forget to sign up for regular email alerts, which will keep you up-to-date with all the latest publications.

Here is a selection of publications designed to help you.

### Apprenticeships

#### ■ Apprenticeships: a guide for union reps and negotiators

#### ■ Apprenticeships: a detailed overview for trade union negotiators and reps

These guides explain how the new programmes work and why unions have an important role to play in their success.

#### ■ Your Rights as an Apprentice

Leaflet for apprentices.

### Collective Learning Funds

#### ■ Making Learning Affordable – setting up Collective Learning Funds

A toolkit for trade unions.

### Equal opportunities and diversity

#### ■ Unions Opening Up Learning

Booklet demonstrating how unions have helped to challenge unfair treatment and discrimination.

#### ■ Women Leading Learning Case Studies

Provides insights into how women are involved in promoting and delivering union learning.

### Higher level learning

#### **I Developing Pathways to Higher Level Learning for Union Learners**

Sets out the lessons from a national project aimed at supporting union members into higher level learning.

#### **I Learning Unlimited**

The results of a joint survey with the Open University showing the union member demand for higher education and the barriers that need to be overcome to meet that demand.

#### **I Supporting Union Learners into Higher Learning: a toolkit for ULRs**

Includes practical strategies for engaging and supporting members and working with providers and employers to increase opportunities into higher learning.

#### **I Trade Unions Aim Higher**

Case study report setting out the experiences of learners who have taken part in higher education with the support of their union.

### ICT and e-learning

#### **I e-learning in the Workplace: a union negotiation and implementation guide**

Provides information and advice during negotiations on the introduction of e-learning.

#### **I ICT and Workplace Learning**

Introductory guides for union members and representatives showing how information and communication technology can be used to expand and develop workplace learning.

#### **I Trade Union Use of ICT to Support Learning**

Five case studies of trade union use of ICT in support of learning in different countries.

#### **I Using ICT in Workplace Learning**

The report is about using ICT to extend workplace learning.

## Learning and organising

### Learning and Organising: union strength through the learning agenda

Gives advice on how to use learning to increase union membership and activism.

## Skills for Life

### English Language at Work

Joint publication with CBI and DIUS which includes ESOL case studies.

### Getting Ready to Work: unions, libraries and the Six Book challenge

Six inspirational stories on how ULRs in Yorkshire and the Humber have worked with libraries to use the Six Book challenge, an incentive scheme for adults who are improving their literacy skills.

### Skills for Life Factsheets

Information on provision and literacy and numeracy.

### Skills for Life Pack

Includes guides for union reps on reading, numeracy, ESOL and dyslexia (soon to be reissued as Literacy, Language and Numeracy Pack).

### Skills for Life and the Whole Organisation Approach

Outlines the successes of the project.

### Skills for Life posters

## Supporting learners

### Coming Out on Top

A trade unionists guide to offering support and services to members facing redundancy in the South West which will also be useful to trade unionists in other regions.

### It's Time to Move On and Take Up

Explains the unionlearn learning and careers service

### The Matrix Standard for Information, Advice and/or Guidance Services

Helps to understand and apply the principles and practices in the standard.

- The Union Learning Quality Award: a new award for careers information and advice**
- The Union Learning Quality Award: information for providers**
- The Union Learning Quality Award: information for union learning reps**  
3 leaflets for unions.
- The Union Learning Climbing Frame**  
An information leaflet about the electronic tool for ULRs.
- The Union Learning Climbing Frame course**  
Describes the two-day course for ULRs.
- Unionlearn Learning and Careers Advice Service**  
Promotional cards  
A3 poster
- Quality Award: New award for careers information and advice**  
Leaflet for unions.
- Supporting Learners Pack**  
Includes guides for union reps on why and how union reps should support learners, sources of help, role and skills of the union rep.

### TUC Education

- On-line Learning with TUC Education**  
Outline of TUC online training courses.
- TUC Education Annual Report**  
Summary of TUC Education's work for the year.
- Unionlearn Directory**  
Includes list of TUC Education programmes and centres.
- Working Women**  
A TUC education workbook for all trade unionists
- Out at Work**  
A workbook on LGBT people in the workplace
- Tackling Racism**  
A workbook for all trade unionists

## ULRs

### **I Learning Works**

Report of the 2009 survey of ULRs and their managers which sets out their profile, activities, barriers and success factors.

## Working with employers

### **I Leaders in Learning**

Case studies showing how management and union learning can help business and the workforce.

### **I Learning is the Business**

Seven case studies based in the South West demonstrating how workplace learning can benefit employers and employees.

### **I Making the Most of Investors in People**

Guide to help union reps understand what IIP can offer union members and how to get involved with managers.

### **I The Right to Request Time to Train: a guide for trade union representatives**

A revised edition (April 2011) that describes the right as it applies to employers with 250 employees and over.

## General

### **I The Learning Rep**

A quarterly magazine including articles and up-to-date information on union-led learning that is sent to all ULRs on the national unionlearn database.

### **I Unionlearn Annual Conference Report 2010**





## Section 8

# Regional contacts

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This publication can also be made available in an agreed accessible format for readers with dyslexia or visual impairment.



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