



Making the case for learning

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A guide for union reps

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Foreword

Learning is vital to the national economy, individual organisations and the people who work for them. It improves performance, helps to manage change and gives individuals a chance to make the most of their own talents – both at work and in the wider community.



Image: Sarah Turton/TUC

Learning happens in many different locations but there is no doubt that the workplace is one of the most important. It provides people with vocational skills and qualifications, the chance to develop a career and the continuous development they need to keep up to date with and manage change. It also helps to put in place the underpinning confidence, skills and knowledge needed to get by in life.

This is why unions are increasingly promoting and developing workplace learning initiatives. All the evidence shows that active union involvement increases the amount of learning that is available, widens its scope, improves its quality and gets more people involved.

At the same time, it also helps to build the union, providing new reasons to join, new ways for members to be involved and new routes to become a union representative.

However, to get these benefits, reps need to be involved in learning in the workplace: to promote it, negotiate for it and build it into day-to-day union activities. This guide shows you how to get started and how to build on what you already have. With the support of unionlearn and your union, you can develop the skills and knowledge you need to get the very best learning for your members.

Frances O'Grady
General Secretary

Introduction

Who is the guide for?

This guide is aimed at union reps who are interested in learning. It provides a range of advice and information to help reps set up – or build on – a union-led learning initiative in the workplace. By this we mean any activity which aims to make learning for personal pleasure, vocational and professional qualifications or career development more accessible and affordable.

What is in the guide?

The guide takes you through the stages of setting up and developing a workplace learning project. It is useful for everything from organising short courses for fun to establishing and running a state-of-the-art workplace learning centre.

It draws on the collective experience of thousands of union reps, advice and guidance developed by different unions and best practice pulled together by unionlearn, learning experts and academics. The emphasis is on practical advice and there are top tips, examples and information drawn from different unions in different sectors.

The TUC Education eNotes service will provide additional information on many issues covered in the guide. eNotes are quick learning modules that you can access from any computer. For example, it would be useful to read this guide in conjunction with the eNote on ULRs – Changing Lives Through Learning, A Quick Introduction to the Role. To register for eNotes go to www.tuceducation.org.uk

Section 1: Making the case for learning gives you overall information on how learning has added a new dimension to unions in the work place. This section:

- pulls together the latest research on the impact of learning
- gives you some arguments for getting employers on board and supporting learning
- shows how you can get other reps involved and link learning in to the rep team in the workplace.

Section 2: Getting started gives you the information you need to build a strong foundation for learning. This section:

- outlines the role of the ULR and the legal rights that support them including time off, facilities and training
- gives you arguments you can use to negotiate with the employer to make sure that you get the time off for training and facilities you need
- outlines the support you can get from your union if you run into trouble.

Section 3: Building support gives you some ideas on how you can develop strong and sustainable learning. This section:

- outlines the benefits to both unions and employers of a learning agreement and gives examples of what they cover and how to negotiate them
- shows how joint learning committees with employers can help to coordinate activity and promote learning across the workplace
- gives examples of the different ways that ULRs work with learning providers to organise courses and activity in and outside the workplace
- discusses the benefits of having some on site learning facilities and looks at the options for different workplaces.

Section 4: Moving on gives you some ideas for taking initiatives forward. This section:

- sets out the different ways that unions promote and communicate about learning in the workplace
- looks at how unions use learning to aid organising and recruitment and how they promote learning through functional skills, digital awareness, higher education, mid-life development review, continuous professional development (CPD), English for Speakers of Other Languages (ESOL), the right to request training and Apprenticeships
- shows you how you can use initiatives such as the unionlearn Quality Award, the Climbing Frame, Investors In People (IIP) and others to improve and embed learning in the workplace.

At the end of every section, there are some suggested activities to help you find out more and to put the learning and advice into practice.

How to use the guide

The guide will help reps in workplaces without learning to get started and give those in workplaces with learning some ideas on how they might move on or try something new. So it is not designed to be read through in one go. It is best used as a source of advice and information on specific subjects or issues. You may find something useful in all sections, though those starting out will find the first three sections most beneficial.

There is a quick project planner to help you put some concrete ideas together when using the guide. It

is designed to help you focus on what you want to achieve and what you need to do to be successful. It can be used with the activities at the end of each section. The planner is in Appendix 4 together with an example of how it can be used to get learning up and running.

Please use the information in the other appendices as well: Appendix 1 provides a summary of the main unionlearn publications and links to where they can be found online; Appendix 2 contains advice on conducting a learning survey; and Appendix 3 gives the contact details for all the unionlearn offices.

Good luck and good learning.



Image: Jess Hurd/reportdigital.co.uk

POA Learning has re-ignited my enthusiasm for learning”

Union learning helps promotion

Graham Ford, a Prison Officer at HMP Dartmoor, is thanking the learning opportunities provided by a union Learning Centre for his recent promotion.

He has been an avid supporter of the courses offered by Prison Officers Association (POA) learning ever since the unionlearn-funded POA Learning Centre initially opened in April 2010.

Graham has studied a whole host of courses varying from IT courses to language tasters. He gained qualifications in Mental Health Awareness, Safe

Handling of Medicines and Team Leading Knowledge.

Graham has definitely caught the learning bug, and has recently been successful in obtaining a promotion to Supervising Officer, where he states his POA initiated learning will be put to best effect both in dealing with staff and offenders in his day-to-day duties.

“POA Learning has reignited my enthusiasm for learning,” says Graham. “The support and guidance offered by POA learning staff has been excellent. I have now decided to become a ULR for the POA. It’s a way of giving something back to the union movement as well as supporting my colleagues along their learning path.”



Image: POA

SECTION 1

Making the case for learning



■ Having a team of knowledgeable and skilled ULRs made these tasks so much easier.”

1.1 The union learning revolution

Unions have always played a leading role in arguing for education and skills to improve the life skills of their members. But this role has grown rapidly in scope and scale over the past 20 years. It is now estimated that unions help over 230,000 people take up learning every year.

This growth in what is now called “union-led learning” has been supported by a number of key developments.

They include:

- the right for unions to appoint workplace union learning representatives (ULRs) with legal rights to training and time off
- setting up the Union Learning Fund which has supported thousands of union-led learning projects
- forming unionlearn, the specialist TUC learning and skills department, to support unions, ULRs and other reps, and promote union learning
- the development of lifelong learning specialists and organisers in virtually every union.

Food manufacturing excellence

McVities Biscuits in Manchester has an award-winning learning centre and programme. It is run and supported by the Usdaw team of ULRs who have played a key role in supporting workforce development.

One recent development is a pilot scheme for Apprenticeships for current workers. Management and ULRs on the joint learning committee put together a business case to identify the business benefits and the investment in learning time needed.

Work on the project required individuals to take on new roles and responsibilities and this challenged established procedures and processes. It brought many unexpected benefits including cost savings for the plant, better methods of working and a group of employees who understood the workings of the plant in a more

in-depth, informed way. This improved their ways of working.

“Having a team of knowledgeable and skilled ULRs made these tasks so much easier,” said Ged Lecky, Skills Solutions tutor. “The initial discussions on how the Apprenticeship would be

delivered were challenging but in the end everyone has benefited,” says Jonathan Waterhouse the Usdaw Learning Centre co-ordinator. “Our members have new skills and have come back to learn other subjects which can only again benefit all concerned.”



But although learning is now part of every union's activity, there are still many workplaces without it. This is not so surprising. It is still a recent development and it always takes time to mainstream a new activity. But the benefits to everyone are now clear.

If you are in a workplace without union learning here are the facts about the benefits. They will help you to make the arguments to get started.

1.2 Making the case for learning – the benefits for members

Learning brings many benefits to members. It can:

- **Improve job security and employability.** Most British and European surveys show that better qualified people enjoy greater job security. Skilled workers with transferable skills also stand a better chance of getting a new job if they are made redundant.
- **Increase pay.** Studies in the UK and Europe have shown that two of the strongest indicators of higher pay are being in a unionised workplace and taking part in regular training and learning. Learning is also associated with promotion and higher grades of pay.
- **Improve well-being.** People involved in learning have higher self-esteem and are more satisfied with life than those who aren't, according to a New Economics Foundation report (2009). In another study, the National Institute for Adult Continuing Education (NIACE) found that good English and maths skills promote health and well-being, as well as having a positive impact on earnings and employment opportunities.
- **Promote equality.** All research shows an inequality in training and learning. Those with the fewest qualifications get least training and those with most qualifications get most training. Improving access to learning is one of the most successful ways of tackling disadvantage and improving earnings and career development.

Given all this evidence, it is not surprising that surveys show that members want their union to improve access to learning in the workplace. In its annual survey NIACE found that over four in five people surveyed (83 per cent) agree that learning can have positive effects on career and employment prospects.

Key areas for learning are underpinning skills such as English, maths and IT, access to recognised qualifications and learning for career development, and continual professional development.

1.3 Making the case for learning – the benefits for unions

Learning brings many benefits to the union. It can:

- **Help to recruit new members.** Learning is a positive offer for members and is one that they value. It is another reason to join the union, and all the evidence shows that unions can really deliver for members on this issue. This is particularly true when they organise a workplace for learning by training ULRs and other reps and negotiating learning agreements. ULRs themselves are additional recruiters; unionlearn surveys show that three-quarters of all ULRs have recruited new members into their union.
- **Provide an organising bonus.** Learning links in with organising campaigns run by unions. It not only provides a positive reason to join but is an excellent way of raising the union profile. Learning gets people to talk about the role of the union and involves members in its activities. It also provides another route into union activity. Around one-third of all ULRs have never held any position in a union but were attracted by the ULR role. Once involved in union activity, many take on other roles.
- **Build positive relationships with employers.** Learning campaigns benefit the employer even when the learning is for personal development; they provide a feel-good factor and have been shown to have a positive impact on workplace morale. Where learning is linked with workplace training and skills issues, the impact is even greater.

■ **Link with campaigns on social justice.** Many union campaigns challenge unfairness and discrimination; learning is a prime example. Bad experiences at school, poor access to learning at work and lack of recognised qualifications all affect equality. Union learning challenges this by providing access to learning and building the confidence to get involved. Unions organising professional staff have also challenged unfair practices. For example, where access to CPD for part-time women returners and freelance staff was restricted, unions have been able to make reforms and widen access.

Most unions now recognise the importance of learning. They link it with a range of campaigns, provide advice and guidance for workplace reps and train ULRs. Many unions also provide courses and learning for members and guidance on how to access them. They can cover everything from skills such as English and maths through to career and professional development.

1.4 Making the case for learning – the benefits for employers

Union-led learning has a range of benefits for employers. It can:

■ **Promote and develop a learning culture.** ULRs play a significant role in delivering benefits for both employers and employees. They have a proven track record in encouraging workers to engage with learning opportunities, especially amongst those who are reluctant to take up training. They help remove barriers to learning by providing support, information and advice, promoting learning and identifying any issues with providers.

■ **Increase the level of workplace skills.** Union learning raises skills levels in a number of different ways: it widens the type of learning that takes place in the workplace and engages those most reluctant to learn. As a result, staff are more willing to undertake training and development. It encourages career development, so builds promotion from within. Unions also promote and support Apprenticeships and vocational qualifications.

■ **Improve performance.** There is a well-established link between the level of training and learning and organisational performances. In general, organisations that invest in training have higher productivity, more effective use of resources and higher staff morale figures (lower absenteeism, sickness etc.). Union learning improves the incidence of learning and so contributes to higher organisational performance.

Although some employers may be sceptical about the value of union learning at the start, once involved they soon see the benefits. The most recent feedback from employers involved in union-led projects showed that more than 90 per cent wanted to carry on (union learning impact report, University of Leeds, 2013).

In a similar survey, 80 per cent of managers felt that staff benefited from union-led learning and over 60 per cent thought it benefited the organisation (*An Evaluation of unionlearn and ULF Rounds 8–11*, Centre for Employment Relations Innovation and Change, University of Leeds 2011).

■ Despite the recession, the company maintained the investment in apprentices as a platform for meeting the company's future skills needs."

Partnership around Investors in People (IIP)

Coast & Country Housing is a registered social landlord responsible for 10,000 homes in the Redcar and Cleveland area. It has achieved the Gold IIP award (the highest).

Gennia Cuthbert, Head of HR and Organisation Development, and David Rollings, Joint Trade Union (JTU) Secretary at Coast & Country, believe that working with IIP has helped forge a stronger and deeper partnership between the company and trade unions and delivered important benefits for the company and the staff.

Union reps are routinely involved in helping design solutions to challenges faced by the business. The JTU Secretary

sits on the organisation development steering group responsible for determining priorities and delivering the action plan. The JTU is also fully involved in developing employee policies and procedures. "Having the trade union representative as part of the Organisation Development Steering Group was enormously helpful," says Gennia.

They have developed a common understanding and approach towards the issue



of skills and, in particular, Apprenticeships. Despite the recession, the company maintained the investment in apprentices as a platform for meeting the company's future skills needs. It also contributed to tackling the levels of unemployment in the area.



Things to find out and things to do

- Survey members about a learning initiative – find out how they feel and what they would like to learn.
- Raise learning at a union meeting and find out what other reps think.
- Talk to reps at other workplaces and find out what they do about learning.
- Look at your union's website to find out what they say – and do – about learning.
- Talk to your organiser/full-time officer about learning and find out what support the union provides to workplace reps.
- Put together a plan to discuss learning at a joint meeting with the employer.

Making the case for learning

Supporting information

Members value learning

UNISON surveyed over 27,000 members on their attitudes to English, maths and computer skills. The results showed both a lack of confidence in their skills and a desire to improve them.

- Sixteen per cent of UNISON members said lack of confidence and skills had stopped them from applying for promotion, 14 per cent from taking extra responsibilities at work and 10 per cent from applying for training courses.
- Members would welcome opportunities to learn. Over 50 per cent wanted to improve their computer skills, 33 per cent were interested in improving their maths and 25 per cent their English skills.

In another survey of union members, the Open University found a large demand for learning and higher education.

- Almost all (96 per cent) either strongly agreed/agreed that it is important to always be learning and increasing one's knowledge and 91 per cent felt that they would always keep on learning to make sure that their knowledge and skills were up-to-date.
- There were different reasons for wanting to take up learning: 81 per cent wanted to study for their own personal development/leisure and over half (56 per cent) thought that gaining qualifications would benefit them in their work.

The union effect on learning

- **Unionised workplaces get more training.** Thirty-five per cent of employees received more than five days training a year in unionised workplaces, as opposed to 24 per cent in non-unionised.
- **Members get more training when their union negotiates on it.** Employees are 24 per cent more likely to receive training in workplaces where unions include training in negotiations.
- **There is more training in workplaces where there are ULRs.** Forty-seven per cent of staff get at least five days per year in workplaces with ULRs compared with 29 per cent in those without.

- **There is more negotiation over training in workplaces with ULRs.** Thirteen per cent with ULRs as opposed to nine per cent in unionised workplaces without ULRs.

Source: Trade Union Recognition and Collective Bargaining, University of Leeds, 2007

Teacher unions and learning

ATL, NUT and NASUWT provide a range of professional and personal development courses for their members. Courses are provided online, face-

to-face locally or at national venues. All unions offer their own courses and work with specialist providers. Courses are free or available at a reduced rate.

Organising and learning

Unite has made learning central to their organising campaign for cleaners working in the City of London, Canary Wharf and London Underground. The campaign provides migrant workers with the learning they need and the confidence to build their union. ULRs are key to this process.

Usdaw link learning and organising through its Check Out learning campaign days in supermarkets. It uses learning promotions to survey what members want to learn. At the same time, it recruits non-members and identifies those who want to be ULRs, shop stewards or health and safety reps.

Managers' views on union-led learning

- Ninety per cent said unions should continue to develop their roles in the learning agenda.
- Fifty-three per cent said union-led learning and ULRs had helped to improve the level of trust between management and unions.
- Fifty-eight per cent said it had improved English and maths skills in the workplace.
- Sixty-eight per cent said that union learning had helped to close skills gaps.
- Fifty-two per cent said it had increased the take up of job-related training.

Source: *An Evaluation of unionlearn and ULF Rounds 8–11*, Centre for Employment Relations Innovation and Change, University of Leeds, 2011, quoted in unionlearn Research Paper 16, 2012

Setting up learning to manage change and redundancy

Boots' national restructuring of its distribution centres involved wide-scale change and redundancy. Usdaw negotiated a national agreement to provide learning for all staff. It established learning centres, set up ULRs and workplace joint committees and gave financial support and time off for learning.

Across the country nearly 65 per cent of staff took up some kind of learning and over 50 per cent signed up for a work-based qualification. In several workplaces,

90 per cent of the staff got involved in learning. It was a good investment for the company too.

Indicators such as staff morale, absenteeism and sickness that usually get worse in redundancy remained steady or actually improved. Business performance improved too: key indicators such as accuracy of orders to stores, improvement in the error rate and the retention of staff, reduced the costs of employing agency workers.

SECTION 2

Getting started



Image: Jess Hurd/reportdigital.co.uk

Union learning representatives (ULRs) are the foundation of union-led learning. This section sets out their role and rights, and provides some top tips on how to deal with problems in these areas.

2.1 What do ULRs do?

ULRs are union reps who are enthusiasts and advocates for learning in the workplace. They raise awareness about learning, assist people in identifying their learning needs and help them to get access to the learning they want. In doing this, they provide – or guide people to – confidential and independent information and advice and guidance on all aspects of learning.

What this means in practice depends on many factors: the type of work, attitude of the employer, size of the workplace etc. ULRs can be involved in vocational learning issues such as Apprenticeships, career advice and by organising personal development and leisure courses. They may be asked for advice on everything from basic computer skills to higher education; workers may also need support to help develop their English skills or to get a shift swap to attend a college course.

In surveys of ULRs¹ unionlearn found that the most common tasks were:

- providing information and advice on learning (94 per cent)
- raising awareness of the benefits of learning (79 per cent)
- arranging learning for employees (77 per cent)
- helping staff to return to learning after many years (64 per cent)
- conducting learning needs assessment (53 per cent)
- offering advice to managers on learning (47 per cent)
- identifying individuals' training needs (46 per cent).

The role is set out in more formal language in the Employment Act 2002, which gives unions recognised by the employer the right to appoint/elect ULRs. To make sure that they have the skills and the time to do

their job effectively, the law also gives ULRs statutory rights. This includes the right to reasonable paid time off for training and for carrying out their duties.

2.2 Becoming a ULR

While any union member in a recognised workplace can put themselves forward as a ULR, the procedure for appointment will vary by union and workplace. All unions have a process in place for the appointment of all union reps. Once appointed, the union must write to the employer with the name(s) of the ULR(s).

Workplaces that are covered by learning or other agreements with the employer often set out guidelines covering the appointment of ULRs. These might cover the number of ULRs allowed, the selection process and length of appointment, as well as their training and time off. In workplaces without agreements, these issues are often agreed locally.

The unionlearn ULR survey found that more than a third of ULRs are new to union activity. Many took on the role after they attended a course and got the 'learning bug'. This interest and enthusiasm for learning is a great motivator and can inspire campaigns in the workplace.

Where ULRs are new to union activity, it is important to make sure they understand their roles as union reps and how they are linked into other union structures and campaigns in the workplace. Most unions have written ULRs into their rule books and many have successfully integrated learning and ULRs into other campaigns. The latest unionlearn survey found that around three-quarters of ULRs have successfully recruited new members through learning.

2.3 Getting the skills for the job

All ULRs must be sufficiently trained to be able to carry out their duties within six months of their appointment. The employer must provide paid time off for the ULR to attend training at the wage they would have earned had they worked during the time spent training.

Some unions provide short induction programmes for new ULRs; this can be anything from a couple of hours

¹ *The Impact of the Union Learning Representative: a survey of ULRs and their employers* Research Paper 9, unionlearn, 2009; *The Role and Impact of Unions on Learning and Skills Policy and Practice: a review of the research* Research Paper 16, unionlearn, 2012

■ ■ Natasha's approachability, enthusiasm and commitment have enabled students to make real progress."

Becoming a ULR

Natasha Love, a lorry driver at Morrisons Distribution Centre in Sittingbourne, became an Usdaw ULR almost by accident.

"I've always been an Usdaw member but never really got involved before," she says, "then one of my friends saw the poster in the canteen asking for ULRs and recommended me. She said it would suit me down to the ground. It turns out she was right – though I hadn't got the faintest idea what it involved!"

Natasha helped to organise English classes and quickly found herself supporting those that were finding it difficult. "They wanted a bit more practice so I went along every Tuesday after the class and helped them with their conversation skills." This work was so successful that it developed into helping staff

prepare for their exams and then one-to-one coaching.

Peter Clements, Kent Adult Education tutor on the course, is full of praise for Natasha's work. "She has really made a difference to people" he says, "her approachability, enthusiasm and commitment have enabled students to make real progress."



Image: Paul Box/reportdigital.co.uk

to a whole day. Inductions help new ULRs feel part of the union team and give them a chance to think about their role and how they might move forward.

ULR training is provided by TUC Education or by the ULR's union; employers cannot substitute their own programmes. The TUC and most individual union programmes consist of two, five-day training courses – Stage 1 and Stage 2. Stage 1 provides ULRs with the skills and knowledge to understand their role and begin to organise and support learning in the workplace; Stage 2 continues this process but helps ULRs to take stock of their development and develops further skills and knowledge. Individual union programmes concentrate on the union's own priorities, structures and services.

Unions must give the employer reasonable notice of training courses and give them time to organise temporary cover. In most workplaces, these people will be the same as those already in place for other union reps.

ULR training and development is a continuous process; it does not stop at the end of the Stage 2 course. TUC Education provides a range of short courses for ULRs to develop specific skills and knowledge and keep up-to-date with new developments. It also provides on-line courses and short online update briefings called eNotes. These deal with specific topics and take around 45 minutes to complete. Individual unions also provide their own follow-on courses and development modules.

2.4 Getting the time and facilities to do the job

ULRs need time away from their job to be successful. The law states that ULRs are entitled to “reasonable time off” for carrying out their duties. What does this mean in practice?

What is reasonable will depend on many different factors. A ULR responsible for 300 members of staff may have more demands than one with 50; ULRs just setting up a learning project will have more to do than those with an established project that is ticking along.

However, some ULRs report that they face barriers in getting the time they think they need to fulfil their role. In a 2009 report commissioned by unionlearn, 70 per cent of ULRs reported that their employers provided them with reasonable time off to conduct their ULR role. The time given for different activities varied (see table below). This means that just under a third of all ULRs are not getting the time they feel they need.

Activity	Yes (%)	No (%)
Reasonable time off to undergo relevant ULR training	83	17
Reasonable time off to conduct ULR role	70	30
Reasonable time off to discuss members' individual training needs	66	34
Reasonable time off to arrange learning or training for members	64	36
Union members able to discuss individual learning needs with ULR in normal working time	75	25
ULR has cover for regular job or a reduced workload to enable them to cover the ULR role	46	54

This is not just a ULR issue; it is faced by all reps. There was a review of workplace representatives' facility time in 2010 which led to a revised Code of Practice on time off for trade union duties from the Advisory, Conciliation and Arbitration Service (Acas). It is in a booklet setting out guidance for employers and unions; a useful publication for ULRs that might help

address any issues they face. Go to acas.org.uk/index.aspx?articleid=2391 to download a copy. Use it with the top tips for improving facilities.

The Code also sets out the kind of facilities that employers should consider making available to ULRs and other reps. They help ULRs to perform their functions effectively and include:

- accommodation for meetings which could include provision to meet to discuss relevant training matters
- access to a telephone and other communication media used or permitted in the workplace such as email, intranet and internet
- the use of noticeboards
- where the volume of the union representative's work justifies it, the use of dedicated office space
- a confidential space where an employee can meet their rep
- access to members who work at a different location
- access to e-learning tools where computer facilities are available.

2.5 Getting support from your union

You should be able to get support and advice from three different sources in your union; the best way to use them will depend on your union and place of work:

- **Other workplace reps.** Learning needs to be part of the overall workplace activity and ULRs should be an integral part of the rep team. Experienced reps will know about any formal and informal agreements, and will be able to advise on the best strategy to adopt with the employer.
- **Professional officer.** Most workplaces will be covered by a union professional officer who will be able to liaise with the regional or head office. Professional officers are experienced negotiators and will be responsible for – or oversee – all negotiations in your workplace so any initiatives or plans should be discussed with them.
- **Learning specialists.** Most unions now have specialist lifelong learning staff who work with reps and professional officers to set up and manage learning projects. Check out your union's website or contact your regional or head office for details.

Unionlearn can also offer advice on setting up learning and will be able to help you contact your union. Contact details for unionlearn can be found in Appendix 3 at the end of the guide.

Things to find out and things to do

- Talk to your union about the procedures for selecting ULRs in your workplace.
- Talk to other reps and find out whether there are any facilities agreements in your workplace and whether they cover ULRs.
- If there are no ULRs in your workplace, talk to other reps and/or your professional officer and put together a plan for ULRs. Think about how many are needed to cover the workplace and what facilities they will need.
- Find out how your union trains ULRs.
- Review any problems that ULRs/reps have in getting time off and put together some proposals for dealing with them.
- If you have ULRs, review how well they are working. Identify any areas that are not working well and put together some ideas to improve things.
- Look at eNotes and identify any modules that could be used by ULRs. Register at www.tuceducation.org.uk

Getting started

Supporting information

Top tips for improving paid time off for ULRs

- Find out what other workplace reps get; ULRs can sometimes be their poor relations. Discuss the issue with other workplace reps and find out how much facility time they get and use this as the minimum for ULRs.
- Get guidance from senior reps or your professional officer. You can also get plenty of advice and information from union colleagues; they will conduct negotiations and advise on the best approach with the employer.
- Raise the issue of workload arrangements. The Acas code suggests that employers consider work cover and workload reductions for reps.
- Consider an agreement with the employer. Unionlearn research shows that those workplaces that have negotiated a learning agreement generally get more facility time than those without.
- Try to schedule ULR time off well in advance. Larger workplaces with joint learning committees plan well ahead so that ULR time off can be built into the business. Other workplaces have standard times for ULR surgeries that suit the business and ULRs. Make sure there is a process for informing line managers well in advance so they can plan for absence.
- Collect evidence of the value that ULRs add to the business; hold award ceremonies and publicise successes; involve line managers and team leaders as learners so they see the value of learning; remind employers that most ULRs also give their own time to the role.
- Monitor the way time off is working – are ULRs getting enough? Are there cases where it has been revoked without warning? Are there any ‘hot spots’ where ULRs always have issues?
- Improve workplace organisation and membership. Generally the higher membership density the better the facility time for reps.
- Be flexible and take into account the needs of the business. This helps to build good relationships and can improve the chance of getting time off.
- Make a list of the office facilities ULRs need and include it in negotiations.

What the law says

ULR statutory functions are to:

- provide information and advice about learning and training
- promote, arrange and support learning and training
- analyse learning and training needs
- consult with the employer about learning and training
- prepare for any of their duties.

ULRs have a right to:

- reasonable paid time off for training and for carrying out their duties
- the employer considering providing reasonable facilities for them, such as accommodation and equipment.

ULRs support learners by:

- providing a familiar face trusted to be impartial
- helping learners to identify their learning needs
- making learning accessible and affordable
- signposting learners to courses and learning
- accessing information for learners, provide direct advice and refer them to expert guidance
- helping learners get funding for their learning
- providing advice and encouragement for those reluctant to take up learning
- accessing learning for those facing change and redundancy
- building equality into the provision of learning.

Where ULRs might need time to carry out their duties

- discussing learning with members, ULR surgeries, inductions at learning centres and for new employees, signposting staff to specialist advisors
- running learning events, promotions and roadshows, discussions with providers, reviewing and evaluating learning, briefings for managers and team leaders, putting together promotional materials
- interviewing staff, preparing, conducting and analysing a workplace learning survey, assessing the need for specialist advisors
- attending learning committees, meetings with individual managers, negotiations about learning matters.

SECTION 3

Building support



Image: Clint Randall www.pixelprphotography.co.uk

Getting a good team of ULRs in place provides a strong foundation for learning but it needs to be supported by other measures if learning is to be sustained. This section outlines four key actions you can take to develop the infrastructure to make learning sustainable.

■ It has changed my life for the better. The skills I have learned have made me more confident at work and in my personal life.”

3.1 Negotiate a learning agreement

Collective agreements – joint agreements between unions and employers – are the best way of regulating issues at work.

They provide a framework that establishes what people are entitled to and set up processes for making any changes to these entitlements. There may be a number of collective agreements in any workplace covering everything from pay levels to equality and diversity. A learning agreement is simply a collective agreement between a union (or unions) and an employer which sets out how they will work together on learning.

Independent research into union-led learning shows that workplaces covered by joint agreements are generally more successful than those without. This is because learning agreements:

- signal the union and employers commitment to developing a learning culture
- set out clear rights and responsibilities of unions, employers and learners
- establish processes for agreeing, promoting, funding and managing learning.

What should be in a learning agreement?

While each learning agreement is unique, there are some common themes or key subjects. They cover:

Statements of intent and purpose

Many agreements set out some broad objectives and core principles. This can include phrases like “a commitment to work in partnership”, “promote a learning culture”, “ensure equal access to learning”, “jointly discuss and promote learning” etc. In many cases, these commitments are spelt out in more detail later in the agreement or in appendices.

Developing a learning partnership

Community the union has developed a successful learning partnership with Kidderminster-based Victoria Carpets. The project delivered 44 NVQ Level 2 qualifications in Performance Manufacturing Operations (PMOs).

The signing of a Learning Agreement helped to develop more opportunities for staff to upskill. It provided site ULRs reasonable paid time off to support learners and gave staff access to learning during works time. As a result, 34 workers achieved further qualifications in numeracy and literacy. This was

followed by the development of a NVQ Level 2 Business Improvement Technique (BIT) programme to complement the PMOs course.

“It has changed my life for the better. The skills I have learned have made me more confident at work and in my personal life,” said

one learner. “My branch members are doing learning they never thought in a million years they were capable of.” “The skills they have acquired are transferable so can be used in other forms of employment should they choose to move on into another job,” said Community Branch Secretary Martin Trickey.

ULRs

Most agreements make reference to ULRs. They include numbers allowed, roles and responsibilities, time off and facilities to carry out their role, initial training and continual development. Some agreements contain detailed information on these issues while others simply contain broad statements of intent. Negotiators will make tactical decisions on these issues, workplace by workplace.

Joint arrangements to manage learning

Many agreements set up joint learning committees to oversee learning. Where this happens, the role of the committee is included in the agreement. This is usually done by establishing the committee in a broad statement and then setting out its role, powers, membership constitution etc. in an appendix or separate document. This means the committee arrangements can be updated without the need to renegotiate the whole agreement.

Employees' rights

Agreements often set out any specific rights that have been negotiated with the employer. The most common area is where the union has negotiated the right for employees to take time off for learning or specific types of learning. Other common rights include time off for assessment and flexibility of work patterns to accommodate learning etc. Some agreements also give guidance on how employees access their statutory rights such as confidential discussions with their ULR or the right to request time off for training (for those in workplaces of 250 or more employees).

Funding learning

Many agreements also set out arrangements for funding to support learning. This can include anything from funding for a learning centre to collective learning funds that the committee can use to subsidise courses or individuals. Once again, the rules governing the fund are set out in a separate document or appendix.

Review and updating

Most agreements should contain arrangements for reviewing and evaluating how well the agreement is working and setting out a process for updating the agreement where necessary.

Don't negotiate an agreement on your own; discuss the issue with other union reps in the workplace. Professional officers and learning specialists in your union will also be able to provide advice and assistance and may wish to be involved in any negotiations with the employer.

3.2 Establish a joint learning committee

Joint learning committees are useful to manage learning initiatives and are often established as part of a learning agreement. Learning committees provide a useful forum for a partnership approach to learning and they are often set up in workplaces without formal learning agreements. They:

- allow work, career and personal learning to be linked together in a coherent strategy
- establish a focal point for learning with clear objectives and plans to deliver them
- bring together all parties in partnership where key decisions can be made and communicated across the workplace.

The broad function of a learning committee is to oversee and coordinate workplace learning activities. This might include:

- agreeing aims and objectives and monitoring progress towards them
- identifying learning needs
- agreeing learning providers
- promoting and publicising learning
- getting feedback from learners
- establishing and managing a learning fund
- overseeing the operation of learning centres or spaces.

Everyone needs to be clear on the role of the learning committee and its terms of reference. These are usually agreed and written down and set out its role, responsibilities, membership, meeting arrangements and a standard agenda. In smaller sites, it may be that an existing forum could carry out the role of a learning committee.

The best way to get started is to discuss the issues with other reps and ULRs. Your professional officer or learning specialist will be able to offer advice and information. There is a lot of advice available on setting up a learning committee and sample terms of reference. Check unionlearn's website, or that of your own union, for more information.

3.3 Set up onsite learning facilities

Many studies show that poor access is one of the main barriers to learning. Shift patterns, family and caring responsibilities and limited provision make it difficult for many to commit to a regular programme of

learning. Bringing learning into the workplace provides a solution to this problem.

An onsite learning facility can be anything from a fully equipped, dedicated learning centre to access to learning via a desktop computer. They don't have to be expensive and the benefits are considerable. Workplace learning facilities:

- boost learning – organisations with onsite facilities have a higher percentage of the workforce involved in learning
- improve skills levels across a wide spectrum
- promote a learning culture by integrating vocational and non vocational learning
- widen the scope of learning through supported online courses with tutor support.

Fully equipped, stand-alone learning centres need to be planned carefully and are best managed through the learning committee, and they are probably best-

Professional development

The rapid development of digital photography highlighted a professional development need for chiropodists and podiatrists.

They are now required to take digital photographs of different foot problems to include in patient clinical records. The pictures can be called for evidence in any complaint and so need to be very detailed and accurate.

The Society of Chiropodists and Podiatrists (SCP) responded quickly and pioneered a customised digital photography course, in conjunction with Lewisham College. The course

was run onsite at the SCP offices in London with use of computers provided by the mobile learning centre.

SCP ULF Project Manager Liz Salem said, "As clinical photography is becoming more and more a part of everyday podiatric practice it is important that podiatrists know how to get the best out of the camera to ensure photographs that stand up to scrutiny."



■ We have now engaged well over 200 ULRs in this work and supported a greater number of young people, with a number of them gaining public sector employment.”

suited to larger workplaces with 300 staff or more. The main issues to think about when setting up this type of centre are set out in the panel on page 29.

Smaller workplaces can provide flexible on-site learning facilities for staff that use desktop computers as part of their everyday jobs. Many organisations use this system for staff training and CPD, and it can easily be extended to cover non-vocational learning.

Where staff are not desk-based, it is now very easy to set up temporary learning facilities. A simple solution is to set up a small space with desktop computers with access to learning via the internet, through CD Roms or both. Some organisations use pop-up centres where a space with wifi is temporarily used for learning, with laptops supplied by the company or an outside provider. These solutions are quite cheap and very flexible.

Another solution is to sign up staff to online courses that they can access externally – either at home, in community learning centres or libraries and then set up a temporary learning space in the workplace. Learners can then meet with the provider to review progress and discuss any issues.

3.4 Establish partnerships with learning providers

A partnership with a good learning provider can make a real difference to the success of workplace learning. Good providers understand the demands of the workplace and are able to work with the joint arrangements typical of union learning projects.

Some workplaces have a partnership with a single provider – often a large company or local college that can meet a wide range of learning needs. This

ULRs as mentors

Civil Service ULRs improved their own skills by helping students through the Public Sector Mentoring Scheme (PSMS) thanks to their union the First Division Association (FDA). The FDA worked with the Civil Service Fast Stream to offer mentoring to young people to improve their job prospects.

Middlesex University designed the training programme and recruited the initial mentees, 80 per cent of them from black and minority ethnic and 70 per cent women. The FDA then arranged training for the ULR mentors, who were given release time to support the students for a minimum of 10 hours over nine months.

“We have now engaged well over 200 ULRs in this work and supported a greater number of

young people, with a number of them gaining public sector employment,” explains Neil Rider, the FDA Project Manager.

The scheme has helped both the mentors and the mentees. Seventy per cent of the mentees felt that the experience had made them more employable and nearly 90 per cent felt more confident about their career prospects. The ULRs themselves learned new skills and helped their own career development.



Image: Bob Bowen Photography

arrangement has some advantages as it builds the trust and mutual understanding that only a long-term relationship can provide. Others, especially smaller workplaces, prefer to use a range of providers especially when they want to offer specialised learning in one or two areas.

There are some key things to allow for when considering which providers to use and whether or not you want a formal agreement:

- **Range of learning.** What areas of learning will you need – not just now but in the future? Can one provider deliver them all satisfactorily?
- **Delivery.** How will learning be delivered – will it be taught courses, e-learning, drop in sessions or a mixture of all three? Do you want learning to take place in the workplace – if not, how close will the venue be? Will the provider be able to supply laptops and internet access if required?
- **Expertise.** What is the provider's track record in different subject areas? Can they deliver to the level required by staff and can they offer progression? Can they deliver the types of advice and guidance that are needed in the different areas?
- **Flexibility.** How flexible can they be when delivering learning to fit in with shift patterns and other

requirements? Can they customise materials and courses to fit your needs? Do they have minimum numbers and if so what are they? Can they offer learning in different formats?

- **Cost.** Can they help to deliver affordable learning? Can they offer lower costs if there is high demand? Will they help to identify funding streams? Can they offer innovative ways of linking learning to minimise cost?
- **Quality.** What is the quality of their learning? What are their latest inspection scores in the areas of learning you want? Do they have the unionlearn quality award?

Don't be afraid to negotiate with a provider even if they are a local college. They receive funding to deliver learning so there is always some flexibility around price and numbers.

Remember that you also bring a lot to the table. Many providers are keen to work with local employers and you represent a large number of learners who will come back for more courses over time. This will enable you to negotiate learning that is delivered in a style, at times and at a cost that meets members' needs. By using your collective bargaining power, you can make learning more accessible in ways individuals cannot.

Things to find out and things to do

- Find out if your union has a model learning agreement.
- Ask reps from other similar workplaces if they have a learning agreement and joint learning committee.
- Work with your professional officer and learning specialist to put together a proposal for a learning agreement and a joint committee.
- Find out if there are any learning facilities at your workplace and who can access them.
- Review the best way of getting on- site learning facilities.
- Find out how learning is delivered in your workplace and who provides it.
- Research local learning providers and find out what they can provide.

Building support

Supporting information

Key issues for learning committees

■ **Membership.** Committees should include ULRs and managers. It is important to include operational managers as well as HR/training personnel and there should be a senior management member who is able to take decisions without referring them back. Many committees also contain at least one senior rep so that there is a clear link to other union structures in the workplace. Providers, learners and outside bodies such as unionlearn are often co-opted to the committee.

■ **Frequency.** Most committees meet at least six times a year. Some meet more often, especially in

larger sites or where there is a lot of activity. Larger committees often set up sub-groups to look at specific topics and issues. In smaller workplaces meetings are often more informal.

■ **Meetings.** Plan dates in advance for the year; always have an agenda and send it out well in advance; give people time to add issues before the meeting; keep minutes and/or action points to ensure continuity; elect a senior manager or rep as Chair so that decisions can be made and acted on; invite specialists along when specific items are on the agenda.

Improving learning provision with unionlearn

■ **Unionlearn quality award.** An award given to programmes offered by providers that demonstrate that union learners are considered in the design, development and delivery of courses; to date, nearly 100 providers have achieved it. The award is given for three years and reviewed annually. No fee is involved and the provider works with a trained unionlearn assessor to demonstrate good practice.

■ **Providing online learning.** Unionlearn is working with online education specialists Tribal to strengthen its support for union-led learning centres. Unionlearn's regional and national teams will provide advice on funding, working with providers, technology and learner support, access to a range of networking opportunities with other centres and free use of a vast selection of high-quality learning materials.

The impact of a learning agreement

Issue	Learning agreement (%)	No learning agreement (%)
Providing facility time for ULRs	98	76
Involved in funding work-related courses	87	71
Involved in functional skills gaps	91	63
Involved in introducing qualifications	86	55
Providing time off for discussions with ULR	81	57
Involved in developing a learning centre	69	36
Joint learning committee	74	26
Involved in apprenticeships	52	34
Involved in funding non work related courses	56	34

Source: unionlearn Research Paper 15, Mark Stuart, September 2011

Agreeing time off for learning

The details should be set out either in the agreement itself or by reference to another document. Identify:

- that all work related training is in work time and is paid for
- what other type of learning qualifies for time off
- how much time off the employee is allowed and whether this needs to be matched by their own time
- the processes that need to be followed
- how statutory rights will be recognised for example in workplaces where employees have the right to request time off for training.

Things to consider when setting up a learning centre

- **Location.** The centre needs to be in a prominent position and in an easily located spot. It will need to be accessible to all including any disabled members. Centres that are tucked away are easily forgotten.
- **Learning.** What courses will be provided? Will it be used for staff training? How will learning be provided – taught courses, online learning or a mixture of both?
- **Equipment.** You will need the full range of information technology – computers with internet access and virus protection, desks and seats that meet health and safety guidelines, printers etc. You may want to add learning packages and other things such as a projector or whiteboard.
- **Usage rules.** Are there rules for using the centre and are staff aware of them? Topics covered often include booking, sites that can't be accessed, maximum time, cleanliness and health and safety etc. Some sites have an induction and ask staff to sign to say they understand the rules.
- **Opening times.** What times will the centre be open to ensure access for all staff? How will security be managed – will staff be able to access it on their own?
- **Staffing.** Centres are more successful if they are staffed, so that advice and support are always available. Large workplaces often have a coordinator who is released on a part- or full-time basis to support the learners and maintain the centre and the equipment.
- **Management.** Learning centres are normally managed by a site learning committee made up of ULRs and management working together.
- **Funding.** How will the learning centre be funded? Is there a budget for equipment and supplies? If the money is in a separate account, how is it managed and monitored?

Usdaw's principles for working with providers

- promote and encourage lifelong learning for their members, and not just skills for their current jobs
- develop and sustain a long-term relationship between the provider and the workplace
- offer a three-way partnership between the employer, the provider and ULRs
- make learning more accessible for their members
- strive to make the learning affordable for their members
- ensure that there are opportunities to provide breadth of learning and progression
- offer advice and professional guidance
- offer the highest quality teaching.

SECTION 4

Moving on



Image: Clint Randall www.pixelprphotography.co.uk

There are many ways to widen the scope of learning once the framework is established. This section looks at how unions publicise and promote learning, link learning to other union campaigns and mainstream learning in the workplace through joint initiatives with the employer.

People weren't just coming in; they were engaging with the providers and seemed genuinely interested in the opportunities on offer."

4.1 Raising awareness in the workplace

Regular communication and promotion spreads the message about learning. One-way communication, from the top down, has a role. It lets people know what's happening and what's available. But it won't be effective on its own. It should be supplemented by communication which engages people, and gives them a chance to get involved. So make sure you have lots of contact and discussion with staff. The best workplaces:

■ **Have a communication plan.** Don't leave communication to chance. Think about what you need to say and what channels you can use to say it. Supplement top-down methods like posters, newsletters, brochures and leaflets with interactive methods like one to one discussions, road shows and promotions. Identify all the opportunities reps get to speak to staff such as meetings, briefings,

and inductions. Don't forget to brief managers and other reps so they are up-to-date with the latest developments.

■ **Follow up learners.** Once people start learning they are likely to continue. Follow them up once their programme is finished, discuss where they want to go next and sign them up. It is also a good chance to check the quality of learning. Good providers will also have a post-course discussion with learners so you can build that in as well.

■ **Celebrate success.** Celebrating peoples' achievements lets members know that something important is happening. It confirms that learning is here to stay and that they can be involved; It is also a good way to recruit new learners. There are many ways to celebrate success: regular presentations of certificates, learner of the month awards, small prizes for achievements, photos of successful learners, articles in company and union newsletters etc.

Organising a Learning at Work Day

"I organised a Learning at Work Day (LAWD) because I wanted to reignite the enthusiasm for self-improvement and get people interested in learning, as I'm very passionate about it. I identified local providers and online courses and prepared a learning survey.

"In the days before the LAWD, I prepared my materials – lots of information about learning and about topics people were interested in, including hobbies like flower arranging. I ordered a buffet, made posters and promoted the event. I also put little packs together and some useful "freebies" like a pencil and notebook.

"On the day, I decorated the room with tablecloths and put some background music on. As people arrived, my nerves about nobody attending disappeared. People weren't just coming in; they were engaging with the providers and

seemed genuinely interested in the opportunities on offer.

"I got some great feedback about the event from both providers and staff. The general consensus was that the information on offer was interesting and relevant to them. Most people

completed the learning survey so I will analyse them and match courses to people. I am looking forward to following it up, now I've got some momentum going!"

Karen Lee, Public and Commercial Services Union ULR



■ Hovis set up and paid for fork-lift truck driving courses and Security Industry Association (SIA) accredited security guard training.”

- **Have a focal point for communication.** Most successful sites have display boards with a range of information about opportunities for learning, pictures of ULRs, course information and explanations, advice and guidance sessions, pictures of course tutors and assessors etc.
- **Make it fun.** Make learning attractive, inclusive and rewarding rather than serious, isolated and threatening. Some workplaces run regular events, barbecues, book launches, taster sessions, canteen and restaurant promotions, information sheets, etc.

4.2 Linking with wider union activity

Section 1 shows how well learning fits with union aims and activities. It increases pay, improves job security, helps career development and increases job satisfaction. It also helps unions to widen the

activist base, aids recruitment and retention and is an excellent way of getting members actively involved in the union.

But because learning is a relatively new addition, the links are not always in place to get these benefits. Here are some suggested courses of action:

Link learning into workplace union structures

There are many different ways to do this. Firstly, make sure that ULRs are invited to rep team meetings. This will ensure that learning can be built into any strategic plans. Learning should be an item on the agenda at meetings so that ULRs can keep other reps up-to-date. If there are learning committees, make sure that at least one of the senior reps is a member.

Coping with redundancy

When the Hovis Leicester bakery announced the site closure with the loss of more than 200 jobs, bakers' union ULF project workers Janet Goodwin and Karen Plasom made sure that staff got the help they needed.

Working with the site reps, they enlisted the help of unionlearn to put together a package of support and information.

It included advice and guidance and a range of training. Staff were offered an interview to discuss the training opportunities and to get advice on increasing their employability. Hovis set up and paid for fork-lift truck driving courses and Security Industry Association (SIA) accredited security guard training.

JobCentre Plus, the National Careers Service and Derbyshire Business College also provided support and information.

Forty people attended the company-paid training and 30 enrolled on courses ranging from security guard training to CV writing and other employability skills. Around 20 workers were able to transfer to the Hovis bakery in Nottingham and others have since found work at other nearby bakeries.



Once the structure is in place, make sure that learning is given a high profile. For example, highlight articles in union newsletters, create a dedicated page on the website, get ULRs to attend rep surgeries and ensure that learning is included in new starter inductions.

Some workplaces also make sure that reps take up popular learning courses so they too can advise members.

Ensure ULRs are aware of their wider union role

ULRs initial training may need to be supplemented by some specific information on their wider union role. It is likely that ULRs who are new to union activity will need to further develop their skills in areas like negotiation, representation, recruiting and organising. Some unions provide workplace courses on these issues and TUC Education also provides courses and eNotes. Some workplaces allocate an experienced rep to act as a mentor to new ULRs in their first year.

Use learning as an integral part of organising initiatives

Learning is important in its own right of course but it also offers something new to union organising activity and provides a distinctive element to wider campaigns. Recruiting and training ULRs immediately builds union organisation and increases the rep team, and while many ULRs are content with their role, some move into other union jobs and become active in other areas of union activity.

Unions have found that learning is a powerful tool for recruiting new members. It offers a positive reason to join and people see it as a union benefit they can access immediately. Many unions provide free learning, career advice and continual professional development as an integral part of their offer to new members. Involving ULRs in workplace recruitment campaigns and new starter inductions makes the most of this benefit.

Learning has also taken centre stage in other union organising campaigns: Unite has used learning to

organise migrant workers in a number of sectors; UNISON has linked learning and organising together in one department and used it to regenerate branches and in a range of health service campaigns; and Usdaw runs a range of Check Out Learning events in supermarkets.

Use learning to enhance other union campaigns

Learning can always add something to mainstream union campaigns. It can help to explain the reasons for the campaign, provide background information and help members to develop new skills and knowledge relevant to the campaign.

Several unions have used maths to enhance pensions campaigns, helping members to develop the underlying skills they need to make important decisions about their future. Others have used a range of free courses to raise awareness about mental health issues and promote good mental health at work. Many unions have used English for Speakers of Other Languages (ESOL) as part of campaigns for vulnerable workers.

4.3 Mainstreaming learning in the workplace

Working in partnership with the employer to widen the scope of joint learning projects to include skills for work – often called training – has many advantages for both unions and employers.

Training is usually presented as solely management's responsibility and some employers may need convincing that it is an area for joint discussion. But unions have always been involved in training, from the regulation of apprenticeships in the nineteenth century to their involvement in Sector Skills Councils in the twenty-first. So it is not a matter of accepting the employer's agenda.

Union involvement improves the operation of training. It breaks down barriers and encourages staff to engage in learning, helps to improve the delivery of learning and offers yet another channel of communication to develop a learning culture. Improving skills levels is

likely to increase pay, enhance job security and widen career opportunities for members.

The scope of the partnership will be shaped by local circumstances and the sector of employment but common subjects include:

- **Underpinning skills.** The focus here is on English, maths and, increasingly, digital skills. These skills are not only important in themselves, they give people the confidence to access other types of training and take on new roles and responsibilities. Partnerships in this area often deliver learning in the workplace, provide paid time off for assessment and offer matched time for learning (an hour of learning in work time for each hour of the employee's own time).
- **Apprenticeships.** Unions in all sectors have negotiated apprenticeship schemes with employers. They cover access for both new staff and existing staff, set out terms and conditions and detail how apprentices will be supported. The best schemes meet the standards set out in the unionlearn Apprenticeship Quality Award and Charter.
- **Access to career development.** Joint action on access to career development covers a range of different initiatives. They include improving access to Higher Education and the use of Foundation degrees, improving links between ULRs and appraisal processes, developing joint approaches to CPD, setting up specialist reviews for older workers and signposting people to the Careers Advice Service.
- **Change and redundancy.** Many unions get involved in initiatives to manage workplace change even where it involves restructuring and redundancy. It is never easy for unions to accept job losses. However, union involvement can help support members through this challenging situation. Union involvement can ensure that members get high quality independent advice, access to learning to improve their skills, support for assessment etc. Where redundancy is involved, unions have negotiated funding for learning, time off for job skills training and workplace links with local employers so that staff can take advantage of job offers.
- **Investors in People (IIP).** IIP is a national award for excellence in learning and development. It helps to improve access to and the quality of learning in the workplace. ULR involvement widens the scope of learning in the workplace and ensures that it meets the full range of staff needs.

Things to find out and things to do

- Review your communication plan, identify where learning fits in and put together a new plan.
- Plan a learning celebration.
- Review how well ULRs link with other union structures and identify any gaps.
- Take a union campaign, identify how learning can fit in and plan how you can run it in the workplace.
- Review workplace organising and recruitment strategy and identify where learning is absent.
- Identify how the scope of any joint discussions/processes could be expanded to include learning.
- Put together a proposal to run a joint campaign on a skills/training issue relevant to the workplace.

■ The charter contains key provisions relating to fair pay, trade union involvement in the programme and commitments to ensure young people receive high-quality training.”

An Apprenticeship charter

Management at Caterpillar Peterlee have been working in partnership with Unite for several years to develop a learning culture and promote the health and well-being of the workforce.

Supporting Apprenticeships has been a fundamental part of that work and the partnership approach has led to continual improvements in the quality of the Caterpillar Apprenticeship programme.

In November 2014, the company and the union felt the time was right to sign the unionlearn Apprenticeship Charter. The

charter contains key provisions relating to fair pay, trade union involvement in the programme and commitments to ensure young people receive high-quality training. It is also a commitment from both the employer, union and unionlearn that there will be a continual drive to monitor and improve the quality of the programme.

Chris Fairs, HR Manager at Caterpillar, said: “We have been working with Unite over a number of years at Caterpillar Peterlee to develop an apprentice programme that is credible and meets our business requirements; we believe that the Apprenticeship charter supports the work we have been doing.”



Image: Christopher Best Photography

Moving on

Supporting information

The Climbing Frame

The union learning Climbing Frame is a free, easy to use website for ULRs. It provides information on different subjects as well as a facility to store information about sessions with learners.

Information in the Climbing Frame is pulled together in learning themes – topics of interest to ULRs such as Functional Skills, Higher Learning and learners with disabilities etc. ULRs can browse each theme for information and access more information through the links to other websites and documents that can be downloaded and printed.

The learner management area of the website is where ULRs can store information about their sessions with learners. Working with the learner the ULR can create a Climbing Frame of actions for them that can help them achieve learning goals. A variety of reports can be produced for the learners themselves and for the ULR to show the overall profile of their learners.

To register on the Climbing Frame go to www.climbingframe.unionlearn.org.uk

Mid-life development reviews

Unionlearn has recently developed a tool to help ULRs offer older workers a chance to review where they want to go next. It is called a mid-life development review and it can help ULRs provide the support that older workers need to continue to play a productive and active role within the workplace.

A Review is a positive intervention for workers, as it helps them consider their situation and plan for the future. Whether preparing for redundancy, promotion,

retirement, training, development or other career and life changes, a review can provide the help and support needed in order to manage these changes.

Unionlearn has a wealth of information and resources to help ULRs use the toolkit. There is a learning theme on the Climbing Frame website and an eNote – a short online training module containing a mixture of text, videos and quizzes.

Unionlearn Apprenticeship charter

Apprenticeships should:

1. be a job with a productive purpose – have progression opportunities to genuine employment
2. be paid at a fair rate – if an apprentice does a full-time job, they should be paid for it or quickly progress incrementally to that point
3. ensure high quality training and clear individual development – a clear programme of training with paid time off and on the job training with supervision, support and mentoring, by appropriately trained work colleagues
4. involve the trade union at every level of the programme – unions should have a constructive role in the development and delivery of the apprenticeship programme
5. ensure apprentices have regular access to, and support from, trade unions – union representatives, especially ULRs, are ideally placed to act as mentors to apprentices
6. be accessible to and achievable by all – attention will be given to enabling people from disadvantaged groups to take up Apprenticeships
7. be part of, and contribute to, a healthy and safe environment – apprentices should be given sufficient training on health and safety, including relevant legislation
8. commit the employer to complement the workforce, not supplement it – apprentices shouldn't be recruited for job substitution, temporary or indirect labour and shouldn't be seen as a way of reducing cost.

APPENDICES

Support and advice



APPENDIX 1

Support and advice from your union and unionlearn

If you are looking for specific help, advice and information about your workplace, then you should contact your union. Most unions:

- provide a database of contacts where you can go for help and advice
- keep information on union policy or conference decisions on lifelong learning issues
- provide a range of resources, model agreements and information to download or order
- offer useful email links and contacts to other organisations.

Some unions have a separate site for learning and these can carry a lot more information. It is a good idea to visit your union's website at least once a week to keep up-to-date.

However, ULRs should also make sure that they get the most out of unionlearn. It coordinates activity around union learning, both nationally and in the regions and offers reps from all unions an enormous range of support, advice and information. This appendix outlines the key services you can use, all of which are free to union reps.

Keeping up-to-date

The unionlearn update service automatically sends you information on the subjects you are interested in. You must register for the service, provide a valid email address and choose which of the 30 subjects on which you would like to receive information. They range from learning centres to skills for a green economy. You can also choose to receive regular updates from specific unionlearn regions and keep up-to-date with local issues and developments. Register at www.unionlearn.org.uk/user/register

Unionlearn also runs a blog on the website featuring a wide range of issues and with contributions from unions, unionlearn staff and external experts. You can access the blog at www.unionlearn.org.uk/blog

Unionlearn also produces an online quarterly e-magazine called *Learning Rep*, which features a

range of learning initiatives across sectors and unions and regular updates on new developments. You can download copies of *Learning Rep* by going to the publications section of the website www.unionlearn.org.uk/publications.

ULR support

Unionlearn offers a range of support for ULRs. It provides a handbook for ULRs called *Working for Learners*. The handbook contains advice and information on a range of subjects from ULRs legal rights to a jargon buster. It is a very useful supplement to your union's ULR handbook. You can view/download the content at www.unionlearn.org.uk/publications/working-learners

Another useful set of publications is the Supporting Learners series, a set of four booklets that sets out why and how ULRs should support learners, helps to develop the skills they need and signposts them to sources of help and advice. You can download the guides at www.unionlearn.org.uk/publications/supporting-learners-packs

There is also a range of guides on how ULRs can support learners with specific issues and interests such as English and maths, higher education, workers over 50, etc. You can get an idea of what is available at www.unionlearn.org.uk/resources

Finally, there are free publications and resources on many different subjects ranging from running a learning centre and the Matrix standard to winning funding or getting career advice. You can also search the site for a specific publication. Go to www.unionlearn.org.uk/resources to find out more.

ULR training and updating

TUC Education provides a range of ULR training through its college networks including the Stage 1 and Stage 2 ULR courses. A range of other courses is also available that includes mentoring and coaching skills.

TUC Education eNotes provide reps with a range of short update courses they can access from a computer.

Each eNote is a self-contained module that contains a mixture of text, videos and quizzes. They last between 20 and 45 minutes and can be returned to as many times as you like. The current list of learning-related eNotes includes Apprenticeships, Supporting Mid-Life Development and Supporting Learners.

To access an eNote you need to register. Go to www.tuceducation.org.uk/mod/page/view.php?id=51438

Unionlearn Climbing Frame

The Climbing Frame is an easy to use website for ULRs and other reps who work with learners. It provides information and advice on a wide range of topics; it also offers a tool to help ULRs store information about sessions with learners.

Information is set out in 20 different learning themes that are topics of interest to ULRs. Users of the website can browse the range of subjects included within the learning themes or use the search function to find specific information. The themes also contain links to external websites, as well as documents

that can be downloaded and printed. The learner management area of the website is where ULRs can store information about their sessions with learners. Working with the learners, ULRs can create a Climbing Frame of actions for them that can help them achieve learning goals.

There is a guide to using the Climbing Frame and an eNote.

To register on the Climbing Frame go to www.climbingframe.unionlearn.org.uk

Unionlearn in the regions

Unionlearn has a specific regional service that has been designed to meet the needs of unions in that region. There are six regions, each with its own workplan.

Unionlearn staff in each region can offer support and advice to any ULR. Find out more about your region at www.unionlearn.org.uk/regions

APPENDIX 2

Conducting a learning survey

Identifying members' learning needs is an important part of a ULRs job. It provides a sound foundation for learning by setting the priorities to get started and identifies other areas that need to be covered in the future.

The methods used will vary. In small workplaces it may be possible to conduct the entire survey by face-to-face interviews. In larger or more spread-out workplaces, you will probably have to use some form of questionnaire.

Think about the best way to distribute and collect the questionnaires. Information technology can make it much easier but you need to make sure that you cater for those without a computer or the skills to use it. However, once collected, using computers to collate and analyse the information can save a lot of time. Make sure you tell respondents that their personal details will be stored on a computer.

When designing a questionnaire, consider the amount of time it might take to collect and analyse the information. Asking lots of open questions gets good quality information but makes it difficult and time consuming to collate; that's why most questionnaires include some closed questions or tick boxes that can be easily and quickly decoded.

The questions you use will also depend on the workplace and the spread of members. It is highly likely that other workplaces will have produced a questionnaire you can use or adapt to meet your own needs, so ask your union or colleagues in other workplaces for examples.

Checklist on completing a learning survey

- Have you agreed the scope of the survey – will it be a joint survey with the employer?
- Are you clear about the information you want and need to collect?
- Are you clear how you are going to collect the information?
- Are any questionnaires easily decoded and analysed?
- Have you identified and briefed reps who will be involved?
- Have you identified how you will promote the survey and ensure all members are aware of it?
- Have you built in time to send out a reminder to members who haven't completed it?
- Do members know how and where to return any surveys?
- Do you know how and who will analyse and collate the results?
- Do you know what you will do with the information once you have got it?
- How will you keep members in the loop about what is happening?

APPENDIX 3

unionlearn contacts

Unionlearn head office

Congress House,
Great Russell Street,
London WC1B 3LS

Tel: 020 7079 6920

Midlands Region

24 Livery Street
Birmingham B3 2PA

Tel: 0121 236 4454

North West Region

NW TUC & Unionlearn
4th Floor
Jack Jones House
1 Islington
Liverpool L3 8EG
Tel: 0151 482 2711

Northern Region

5th Floor
Commercial Union House
39 Pilgrim Street
Newcastle Upon Tyne NE1 6QE

Tel: 0191 227 5560

South West Region

Church House
Church Road
Filton
Bristol BS34 7BD

Tel: 0117 947 0521

Southern and Eastern Region

Congress House
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London WC1B 3LS

Tel: 020 7467 1284

Yorkshire and the Humber Region

Room 102, West One
114 Wellington Place
Leeds LS1 1BA

Tel: 0113 242 9296

Scotland

TUC Education
4th Floor, John Smith House
145–165 West Regent Street
Glasgow G2 4RZ

Tel: 0141 221 8545

Wales

TUC Education
Unite House
1 Cathedral Road
Cardiff CF11 9SD

Tel: 029 2034 7010



APPENDIX 4

Making the case for learning **Quick project planner**

What do we want to achieve in the next six months?

What tasks do we need to complete to get there?

What are the first things we need to do/who is going to do them?

Where can we get more information?

Where can we get help?

Making the case for learning

Example quick project planner

What do we want to achieve in the next six months?

- Get a framework for learning in place and run some short courses

What tasks do we need to complete to get there?

- Get ULRs in place and train them up
- Get management support – some form of joint agreement
- Set up learning committee or adapt current joint forum
- Find out what learning people are interested in
- Find a provider
- Get some learning going

What are the first things we need to do/who is going to do them?

- Discuss learning with the rep team/Area Organiser. *AH to put it on the next agenda*
- Get information on ULRs/training from union *JP*
- Find out other local sites with learning *AH*
- Raise the issue with management agree at reps meeting
- Investigate eNote Changing Lives Through Learning *FS*

Where can we get more information?

- Union website/local office
- Contact regional unionlearn office
- Download/order ULR handbook from unionlearn

Where can we get help?

- Area organiser
- Union learning specialist
- Local college
- Unionlearn region

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