

POLICY INTO PRACTICE:
IS UNION LEARNING REPRESENTATIVE ACTIVITY MEETING THE EXPECTATIONS OF ITS
PRINCIPAL STAKEHOLDERS?

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Abstract

Policy into Practice:

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The TUC (Trades Union Congress) proposed that union learning representatives could play a role in developing a new culture of lifelong learning at the workplace as the health and safety representative movement has had a major impact on making work environments safer. This is the most extensive piece of research that has been done on union learning representative activity in the North-West region of England. Analysis of data, collected on behalf of unionlearn with the North-West TUC, identified that there were principal stakeholders that had an interest in the success of the union learning representative initiative; the Government and its agencies, TUC/ unionlearn, affiliate unions, employers and, as service users, union members. This thesis investigates to what extent union learning representative activity meets the expectations of those principal stakeholders. The investigation is underpinned by literature that explains the conceptual framework for workplace learning, stakeholder theory and unions and learning. The missing link appears to be the failure of the sponsors of the initiative (Government, TUC and CBI) to acknowledge the possible resistance of some employers to facilitate union learning representative activity in their workplaces. The history of vocational education and training (VET) within the UK testifies to employers' resistance to be responsible for the facilitation of this. Employer representatives such as CBI (Confederation of British Industry) and CIPD (Chartered Institute of Personnel and Development) have no formal influence on the behaviour of employers in respect of the provision of learning opportunities for employees. For any of this to happen, employers have to cooperate and individuals (union members) have to want to participate. The nature of the employment relationship and employers' acceptance of the right for collective bargaining is identified as crucial for the union learning representative initiative to be effective in the workplace. These conclusions contribute to the knowledge of the union learning representative initiative as the findings have been analysed through the lens of a body of literature concerned with workplace learning. Other reports are of findings from national surveys or specific unionlearn projects.

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I would like to dedicate this thesis in memory of my beloved parents, Cliff and Marian Hollinrake, my dear brother Phil and my grandfather Samuel Hollinrake.

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Glossary of Terms

Acas - the Advisory, Conciliation and Arbitration Service - a Crown non-departmental public body of the government of the United Kingdom

AMICUS - Amicus organised workers in almost every industry, predominantly in the private sector

BfS - Bargaining for Skills

BIS - the Department for Business Innovation and Skills

CBI - Confederation of British Industry

CEDEFOP - European Centre for the Development of Vocational Training

CEOs - Chief Executive Officers

CERIC - Centre for Employment Relations Innovation and Change

CIPD - Chartered Institute of Personnel and Development - the professional body for human resources and people development.

CSCS - Construction Skills Certificate Scheme (CSCS)

CWU – Communication Workers Union. Represent members in postal, telecom, mobile, administrative and financial companies

DfEE - Department for Education and Employment (1995-2001)

DfES - Department for Education and Skills (2001-2007)

DWP - the Department of Work and Pensions

ED - Employee Development

EDAP - Ford Motor Company's employee development and assistance programme

ED Schemes - Employee Development Schemes

ELD - employee-led development

ESF - European Social Fund

ESRC - Economic and Social Research Council

FSB - Federation of Small Businesses

FTOs - full-time officers

GMB - GMB is a general union, represents members working in every part of the UK economy.

HMRC - Her Majesty's Revenue and Customs (the tax office)

HRD - human resource development

HRM - human resource management

IAG - information Advice and Guidance

ICT - information computer technology

liP - Investors in People

IoD - Institute of Directors

IRS -

ITBs - Industrial Training Boards

ITOs - Industry Training Organisations

LSC - Learning and Skills Council

NEDO - National Economic Development Office

NETTs - National Education and Training Targets

NHS - National Health Service

NVET - national vocational education and training

NVQ - National Vocational Qualification

NW - North-West

NWDA - North-West Development Agency

PCS – Public and Commercial Services Union (represents members in the civil service and government agencies and the private sector, usually in areas that have been privatised)

PIU - Performance and Innovation Unit

PSH - principal stakeholders

RDAs - Regional Development Authorities

RLB - Rover Learning Business

SAE - self-addressed envelope

SEMTA - sector skills council for science, engineering and manufacturing

SFA - Skills Funding Agency

SMEs - Small and Medium-sized Enterprises

SSCs - Sector Skills Councils

T&G - The Transport and General Workers' Union (also known as the TGWU and the T&G. Merged with Amicus to form Unite the Union in May 2007)

TECs - Training and Enterprise Councils

TNA/DNA - training or development needs' analysis

TQM - total quality management

TUC - Trade Union Congress

TUC LSTG - TUC Learning Services Task Group

TULR(C)A - Trade Union and Labour Relations (Consolidation) Act 1992

TUPE – Transfer of Undertakings (Protection of Employment)

Ufi - University for Industry

UKCES - UK Commission for Employment and Skills

ULF - Union Learning Fund

ULR - Union Learning Representative

unionlearn - unionlearn is the learning and skills organisation of the TUC

UNISON - represents and acts for members working in a range of public services and utilities

USDAW - Union of Shop, Distributive and Allied Workers.

VET – Vocational Education and Training

WCM - world class manufacturing

WEA - Workers Educational Association

WETUC - The Workers' Education Trade Union Committee

Chapter 1: Introduction

The aim of this thesis is to provide a critically informed response to the research question:

To what extent is Union Learning Representative activity meeting the expectations of its principal stakeholders?

This introduction provides a brief regarding the development of the union learning representative initiative. It will present the role descriptor that defines what was anticipated to be a typical union learning representative practicing within the workplace. It will then provide an overview of the structure of the thesis and the approach taken in developing a critically informed response to the research question. The introduction concludes with a summary of what is claimed as the contribution to knowledge from this research project.

The TUC and the CBI had engaged in dialogue in 1990 (TUC, 1990) to consider how best to achieve their shared objectives of continuous training for all. The foundations for the union learning representative initiative were set when the Training and Enterprise Council (TEC) and Trades Union Congress (TUC) launched Bargaining for Skills (BfS) in 1994. The initiative was funded by the then Department for Education and Employment (DfEE). BfS supported projects that organised a range of activities to increase union awareness and participation in training and development in the workplace. This was the precursor to the union learning representative initiative. The government's desire was influenced by views about the value to the economy of embracing lifelong learning. Meanwhile there were examples of projects, such as Ford's EDAP (Employee Development and Assistance Programme) scheme and the Rover Learning Business, that aimed to encourage employees to practise learning activity. In these projects the trade unions were a stakeholder in partnership with the employers.

The Fryer Report (Fryer, 1997) was the outcome of a request by the then Secretary of State for Education and Employment for advice on the preparation of a White Paper on Lifelong Learning. The report aimed to make the case for the development of a culture of lifelong learning for all, throughout the United Kingdom (Fryer, 1997). An outcome of the Fryer Report (Fryer, 1997) was the launch of the Union Learning Fund (ULF). This was funded by

the then Department for Education and Skills (DfES). Since 1998 the DfES and its successor departments, up to and including, the current Department for Business Innovation and Skills (BIS) have invested over £150m. in the development and maintenance of the ULF. Investment currently stands at £21.5m. per annum. The idea for the union learning representative initiative was posited by the TUC Learning Services Task Group (TUC LSTG) in 1998. There was a hope that union learning representatives would do for learning and development what health and safety representatives had done for Health and Safety in the workplace since 1974. The TUC LSTG claimed its remit was to:

“... make proposals for strengthening union involvement in lifelong learning and skills training [...]”

(TUC, 1998:5)

The expectations of the union learning representative - a voluntary, lay officer, role - ranged from ‘generating demand for learning amongst learners’ through to ‘working with employers to introduce, implement and monitor initiatives’. The activities that comprised the union learning representative role were first identified by TUC LSTG in 1998. A revised set of tasks that comprised the role was published as part of the statutory rights for union learning representatives by Acas in 2003. The TUC went on to identify a further revised role descriptor for the union learning representative role in 2004 (TUC, 2004:7). The activities prescribed in the revised role descriptor are presented in Table 1 below.

Table 1: Union learning representative role descriptor (TUC, 2004:7)

	Activity
1	Raising employees’ awareness of benefits of learning.
2	Providing learning advice and guidance to employees.
3	Working with employers to identify learning needs.
4	Securing equal opportunities in learning.
5	Negotiating learning agreements with employers including time off for study.
6	Helping employers to establish employee development schemes.

7	Establishing and running trade union learning centres.
8	Supporting innovative workplace development, such as Union Learning Fund projects.
9	Monitoring quality of provision.

The activities have been numbered for reference. For this research project, the union learning representative role descriptor (TUC, 2004) has been selected as the benchmark for what the PSHs expect from union learning representative activity. This is because the primary data was collected from 2004 to 2008 and so this was the defined role at that time and remains largely unchanged today. Reference to the 2004 role descriptor demonstrates there was the expectation that union learning representatives would work with their employers via tasks 3, 5, 6, 7 and 8 and with their colleagues via tasks 1, 2, 7 and 9. Union learning representatives were also expected to get involved in the learning and development process in the workplace via tasks 3, 6 and 9. The discussion in Chapter Three on workplace learning illustrates that a consideration of the evidence showing the reality of workplace learning suggests that this is an optimistic aim for the role of the union learning representative in the workplace. Thus it appears that there is a contradiction between the rhetoric and reality of union learning representative activity in the workplace. Analysis of data, collected on behalf of the then TUC Learning Services North-West Region (now unionlearn with the North-West TUC), identified that there were various stakeholders who had an interest in the success of the union learning representative initiative: the government and its agencies, unionlearn, affiliate unions, employers and union members. This informed the research question posed for this project:

To what extent is union learning representative activity meeting the expectations of its principal stakeholders?

The following objectives were set to facilitate the process of providing an informed response to the research question:

1. To identify the principal stakeholders (PSHs) to the union learning representative initiative from 1997 to 2008

2. To identify the intent of PSHs for the union learning representative initiative from an analysis of relevant PSHs' policy documents from 1997 to 2008
3. To investigate PSHs' expectations of the union learning representative initiative
4. To identify and describe shifts in PSHs' expectations of the union learning representative initiative from 1997 to 2008
5. To provide a critically informed account of the extent to which those expectations had been met by the May 2010 general election

The TUC's union learning representative role descriptor (TUC, 2004:7) has been applied as the benchmark for what PSHs expect from union learning representative activity.

Accordingly data has been analysed against these activities to provide an informed opinion as to the extent to which those expectations have been met. The research presented in this thesis is:

"...the most extensive piece of research completed to date on union learning representatives in the North West."

(Eva, cited in Hollinrake, 2006:1).

Thesis Structure

Chapter 2: Stakeholder theory

The literature that has been accessed has enabled the discussion to provide evidence that the principal players in the union learning representative initiative can be termed as 'stakeholders'. Techniques from stakeholder analysis literature have been applied to analyse the role of the principal stakeholders (PSHs) to the union learning representative initiative. The first of these is an adaptation of Johnson and Scholes' (1997:186) model of the chain of corporate governance. This is applied to demonstrate the position of PSHs at national, regional and local level. It also highlights the distance between the principal decision makers at national level, who decreed the aim and objectives of the union learning representative initiative plus the design and definition of the union learning representative role, to the PSHs at local level, who are fundamental to any union learning representative activity taking place. Secondly, Johnson and Scholes' (1997:198) stakeholder mapping: the

power/interest matrix is applied in order to demonstrate the impact of the power and interest of PSHs to the facilitation of union learning representative activity.

Chapter 3: Workplace learning

Within this chapter the context of workplace learning is investigated. The stakeholders in respect of workplace learning are identified as being the same as the PSHs to the union learning representative initiative. The literature demonstrates that often the workplace does not readily support and facilitate learning. By considering the literature, enhancers and inhibitors to workplace learning have been identified. Other commentators offer suggestions for strategies that might better facilitate workplace learning. These are considered and compared to the activities involved in the role of the union learning representative. It is concluded that focussing more on the interpersonal union learning representative activities (tasks 1, 2 and 11 in the 2004 role descriptor in Table 1, above), focussing on what Harrison (2009) refers to as 'helping' activity, rather than on learning and development process activity, could encourage a change in attitude and response to skill shortages in the workplace and the facilitation of workplace learning.

Chapter 4: Unions and learning

This chapter considers literature on trade unions and their role in promoting and supporting workplace learning. A short summary of the history of trade unions' involvement in education and learning in the UK is provided. Other accounts of union and employer partnerships in promoting workplace learning are accessed and discussed. The next phase of the chapter considers literature specific to the union learning representative initiative.

From the evidence, it appears as if the union learning representative initiative and its activity within workplaces were imagined to be the panacea to overcome and redress the shortfalls of skills provision within the workplace. Union learning representative activity was also perceived to be able to contribute to the facilitation of the national skills strategy within the workplace. It is concluded that this is a tall order for lay representatives of voluntary organisations. It is confirmed that the union learning representative role descriptor (TUC, 2004) is presented as the then TUC Learning Services' (now unionlearn with the TUC's) expectations of the union learning representative initiative. The conclusion is that the issues identified as enhancers and inhibitors to workplace learning in the

previous chapter are also significant issues in the support or otherwise of union learning representative activity.

Chapter 5: union learning representatives and UK vocational education and training (VET) policy

This chapter reports the outcome from documentary research and part literature review. These sources reflect the development of UK national vocational education and training (NVET) policy, commencing with the 1981 New Training Initiative, training White Paper 'Employment for the 1990s' and continuing through to policy documents published up to the autumn of 2010. The aim was to trace references to the development of the union learning representative initiative via UK NVET policy. This perspective has enabled the identification of the context, from the mid-1990s, that required the principal stakeholders (PSHs) to be concerned with issues of lifelong learning for the UK adult population. In particular, for this piece of research, the UK workforce. **Chapter 6: Methodology**

The chapter opens with a discussion about the perspective taken towards the research, and presents the research philosophy as being one of realism. The six phases of data collection are discussed. The mixed methods approach applied to the data collection is considered and it is concluded that the nature of the research project also influences the research philosophy applied. The research falls into six phases: phases one to four cover the survey work carried out in the North- West region of England from 2004 to 2006; phase five is described as 'participant as observer' and includes the author's training and involvement as a University and College Union (UCU) union learning representative; phase six involved the collection of secondary data via documentary research and made use of responses from respondents identifying themselves as being in the North- West region of England, to unionlearn's national 2008/09 union learning representatives and their managers survey.

Chapter 7: Findings and analysis – local (North- West region of England) perspective

The findings from Chapter Six justified the application of the 2004 union learning representative role descriptor to the analysis of the primary data collected in the North- West region of England region, and the results are reported in this chapter. The evidence of activity is reported against the nine tasks specified in the union learning representative role descriptor. Both quantitative and qualitative data are used to demonstrate the impact of the PSHs on union learning representatives' activity. This is summarised for each activity

and an overview is presented in a table at the end of the chapter by activity and PSH. There is also a report of findings from supplementary qualitative data supplied by respondents.

Chapter 8: Discussion

This chapter discusses the key findings presented in Chapter Seven, in line with the main arguments presented in the literature concerned with Workplace Learning (Chapter three) Unions and Learning (Chapter four), union learning representatives and UK vocational education and training policy (Chapter five). What emerges is that there is a recorded history of the lack of impact of UK national vocational education and training (NVET) initiatives. Also identified is that the facilitators and inhibitors to union involvement in workplace learning are the same as those identified in respect of workplace learning per se.

Chapter 9: Conclusion and contribution to knowledge

The final chapter responds to the set objectives to facilitate an informed response to the research question. In so doing, it pulls together the key issues identified from the research in respect of what enables union learning representative activity to meet the expectations of its PSHs and what hinders it. Claims are made for how this research contributes to the knowledge and practice in this field. The chapter concludes with the identification of research that could further inform knowledge and practice of such workplace learning activity.

Appendices

Appendices 1-12 are related to the methodology, and to the project management as the researcher executed the expectations of the commissioner of the survey work in the North-West region of England region. They also display the subsequent process that was necessary for the design, circulation and data collection from the data collection tools, surveys, interviews and focus groups.

In Appendix 13 the qualitative evidence is discussed in relation to the principal stakeholders (PSHs), and in regard to the other factors that appear to facilitate, enhance or inhibit each of the union learning representative tasks as laid out in the 2004 role descriptor. In addition to the quantitative survey responses, qualitative data from the nine focus group events is referred to, as detailed in the methodology chapter.

Conclusion

The research question and the area of study lent themselves to a realist approach. The application of a mixed method methodology has facilitated the collection of data that provides insight to the reality of union learning representative activity in the North- West region of England. The data has been analysed and compared to existing knowledge and understanding of workplace learning and the response of the PSHs in supporting initiatives such as that to introduce union learning representatives into UK work organisations.

The findings show that the Union Learning Representative role descriptor (TUC, 2004) was not a realistic expectation of what union learning representatives could achieve without the support and co-operation of the PSHs to the union learning representative initiative. The voluntaristic approach to facilitating workplace learning has meant that the local employers, whose involvement is essential for the practice of union learning representative activity, were not included in the design of policy and implementation procedures for the union learning representative initiative, unlike other PSHs.

This piece of work has analysed the union learning representative initiative and its activity in the North-West of England through the lens of a body of literature concerned with workplace learning. The facilitators and inhibitors identified in the workplace learning literature are the same as the facilitators and inhibitors identified in the employee relations based reports of the union learning representative initiative. Some of these inhibitors are also PSHs to the initiative.

Chapter 2: Stakeholder Theory

The objectives for this chapter are as follows:

1. To provide evidence that the principal players in the union learning representative initiative can be termed as 'stakeholders'.

Plus, on justifying that evidence, then:

2. To identify techniques from stakeholder analysis literature that will support the analysis of the role of the principal stakeholders (PSHs) to the union learning representative initiative.

The term 'stakeholder' is defined as:

"a person with an interest in something or concern in something esp. a business."
(Concise Oxford Dictionary, 1995:1355)

The concern with stakeholders in this research is groups with an interest or concern in the union learning representative initiative. Within the literature considered for this thesis, stakeholder theory is discussed in terms of 'the organisation', 'the firm', 'the corporation', and 'managers'. On occasions when such terms as these are referred to and where it is relevant, the term 'union learning representative initiative' will be presented as an adjunct in parentheses in an attempt to contextualise the discussion to the union learning representative initiative. For the purposes of this research, it is important to demonstrate the term 'stakeholders' can be justified and then, if so, assess whether or not stakeholder 'management' exists in the union learning representative initiative and if the existence or absence of this has an impact on whether or not the union learning representative initiative meets the expectations of its principal stakeholders (PSHs). Freeman (2010:31) defines the term 'stakeholder' as:

"... those groups without whose support the organisation [union learning representative initiative] would cease to exist."
(Freeman, 2010:31)

In an organisational context he identifies a list of stakeholders, including shareowners, employees, customers, suppliers, lenders and society (2010:32). Taking this list as a benchmark, it is proposed that it transfers across to the union learning representative initiative as follows: the union learning representative initiative as the 'organisation', the government as shareowners and customers, unionlearn, affiliate unions and their union learning representatives as employees, employers as suppliers and customers, and union members as customers. Whilst this thesis claims that there are stakeholders to the initiative, how stakeholder management of the PSHs is practised is less easy to identify. If it existed, stakeholder management would attempt to facilitate increased performance from the union learning representative initiative. Instead, the union learning representative initiative relies on the PSHs to identify and acknowledge each other as legitimate stakeholders and to demonstrate the view that all stakeholders' interests have intrinsic value. Evan and Freeman identify that:

"Stakes require action of a certain sort, and conflicting stakes require methods of resolution"

(Evan and Freeman, 1993, cited in Chryssides and Kaler, 1993:259)

They suggest that by paying attention to customer needs, management automatically addresses the needs of suppliers and owners and that the ethics of customer service can carry over to the community.

Donaldson and Preston (1995:85) refer to 'quasi-contracts' between stakeholders and the firm [union learning representative initiative]. Donaldson and Preston (1995:76) state that:

"... stakeholders are defined by their legitimate interest in the corporation [union learning representative initiative], rather than simply by the corporation's [union learning representative initiative's] interest in them."

(Donaldson and Preston, *ibid*:76)

The union learning representative initiative is funded by the government and until 2006 this was via the Learning and Skills Councils (LSCs). The LSCs were government agencies, managing the key resources for the initiative, LSCs were seen as legitimate by other PSHs. Given the shift in governance of the union learning representative initiative from 2006 to

unionlearn, it is appropriate to consider a quote from Jones and Wicks, cited by Donaldson, (1999:240):

“An essential feature of practicability in stakeholder theory is that the firm [union learning representative initiative] remains viable... Managers who attempt to implement an impractical normative core will fail in their basic moral obligation to protect and advance the ‘stakes’ of those who make the firm [union learning representative initiative] a going concern.”

(Jones and Wicks, cited by Donaldson, *ibid*:240)

Friedman and Miles (2002:1) present a model that they say highlights the importance of distinguishing between different stakeholders. The model enables an analysis of the organisation [union learning representative initiative]/stakeholder relationship that is not exclusively from the organisation [union learning representative initiative] perspective, and, according to Friedman and Miles:

“... is capable of illuminating why and how organisation/stakeholder relations change over time.”

(Friedman and Miles, 2002:1)

The transfer of the authority to manage and distribute the key resources for the initiative to another PSH, i.e. unionlearn with the TUC, from 2006 was unlikely to be seen as legitimate by the employers and is likely to have received mixed responses from the affiliate unions. Co-operation from these two key PSHs, the employers and the affiliate unions, is the ‘sine qua non’ of the union learning representative initiative. It could be claimed that, at this point in 2006, unionlearn with the TUC became ‘the managers’ of the union learning representative initiative. The work of Mitchell et al. (1997, cited in Friedman and Miles, *ibid*) suggests the stakeholders become important to managers [union learning representative initiative] and those managers perceive them as having power, legitimacy and urgency. Each attribute is variable. Friedman and Miles’ critique of Mitchell et al.’s work is that the focus is on:

“... defining who or what are the stakeholders of the firm rather than the dynamics of the organization/stakeholder relation.” (Friedman and Miles, *ibid*:2)

This is a relevant consideration for this research. The dynamics of the employment relationship at both macro and micro level may well influence the nature of the union learning representative initiative/stakeholder relation, as it will be influenced by the stakeholders' 'normal' modus operandi with each other in the other activities in which they are involved. For example, at macro level, the TUC negotiate with and lobby the government in respect of employment rights in the UK; and affiliate unions negotiate with and lobby the TUC to represent their members' interests in discussions with the government. Whilst at micro level, branch officers negotiate with and lobby their regional and national officers in respect of their members' interests. Also at micro level, there are union/management joint consultative committees negotiating the terms and conditions of employment for employees. Evan and Freeman quote Kant's dictum:

“Treat persons as ends unto themselves’ and it should come as no surprise that persons respond to such respectful treatment, be they customers, suppliers, owners, employees or members of the local community.”

(Evan and Freeman, 1993, cited in Chryssides and Kaler, 1993:261)

Evan and Freeman suggest that widening the group of stakeholders would include competitors and governments and see no reason why trade associations and other multi-organisational groups cannot join together to solve common problems. They conclude that the implementation of stakeholder management principles could, over time, mitigate the need for industrial policy and increasing government intervention and regulation. Evan and Freeman's work identifies two stakeholder management principles. They label these as 'P1' and 'P2'. The characteristics of these principles are as follows: for P1, the corporation [union learning representative initiative] should be managed for the benefit of the stakeholders. The rights of the stakeholders must be ensured and the stakeholders must participate in decisions that affect their welfare (in relation to the union learning representative initiative) or involve them being used as a means to another's ends. In P2, management bears a fiduciary relationship to stakeholders and the corporation [union learning representative initiative] as an abstract entity and must act in the interests of the stakeholders as their agent and in the interest of the corporation [union learning representative initiative] to ensure its survival and the safeguarding of the long-term stakes of each group. They acknowledge that some claims by the stakeholders may be in conflict

with each other and that there are no 'magical resolutions', but P2 lends those conflicts legitimacy and gives management a clear directive to pay attention to stakeholder claims.

Evan and Freeman offer ideas for structural mechanisms to facilitate P1 and P2 within the corporation [union learning representative initiative]:

A stakeholder board of directors (decision-making board) would be established, with each stakeholder group represented on this board. They suggest that these should all be elected posts, from a stakeholder assembly. A metaphysical director would be elected from the corporation [union learning representative initiative] by all stakeholder groups. This director would be a key link between the stakeholder representatives and management and would aim to protect the norms and interests of all stakeholders. Stakeholder advisory boards could be established that would serve as advisors to the existing board and eventually would replace the existing board. Evan and Freeman suggest a Stakeholder Bill of Rights and a Management Bill of Rights; these terms of reference should protect political freedoms and the principle of democracy. Furthermore, they suggest that issues of governance should be identified and agreed locally, to suit the local context and rather than a wholesale major change in the modus operandi of the corporation [union learning representative initiative]

Amended from (Evan and Freeman, 1993, cited in Chryssides and Kaler, *ibid*:262-265)

The relationship of individual PSHs with the initiative (Friedman and Miles, 2002) might be determined by the nature of the relationships between PSHs at different stages of the union learning representative initiative. Given that the union learning representative initiative is a publically-funded initiative, the impact of change in government from Conservative to Labour during the life of the union learning representative initiative is likely to impact on the relationship of the PSHs to the initiative, as is the guardianship of the initiative from the LSC to unionlearn with the TUC in 2006.

Thus, from what has been discussed so far in this chapter, it is claimed that the principal players in the union learning representative initiative can be identified as stakeholders. This chapter will now go on to look at the application of principles of stakeholder analysis to the context of the union learning representative initiative.

Stakeholder Analysis

In order to understand the expectations of the PSHs of the union learning representative initiative at the point of its inception, the author proposes that the development of the union learning representative initiative can be seen to mirror its strategic management. In applying the work of Johnson and Scholes' to this discussion, the union learning representative initiative takes the place of references to 'the organisation'. Johnson and Scholes (1997:80) do not prescribe how strategy should be managed, rather they discuss what they perceive as important to understand: that is, the reality of strategy development. Johnson and Scholes' (ibid.) discussion concerns organisational strategy but it is posited here that the principles to which Johnson and Scholes (ibid.) refer can be applied to the context in which the strategy for the union learning representative initiative in England and Wales was developed. Johnson and Scholes go on to say that:

"... those who seek to influence the strategy [of organisations] must do so within that reality."

(Johnson and Scholes, ibid.:80)

Thus those developing the strategy for the union learning representative initiative needed to do so within the reality of the stakeholders involved in making it happen. Johnson and Scholes suggest that the definition of strategic issues and choice of strategies are sometimes based on perceptions of what powerful people [in the initiative] see as the problem. Their views influenced by their past experience of similar situations. Their beliefs influenced by the cultural and political context in which they exist (Johnson and Scholes, ibid).

Stakeholders are those individuals or groups who depend on the organisation, or, in this case, the initiative, to fulfil their own goals, and on whom the initiative depends (Johnson and Scholes, ibid:184). According to Johnson and Scholes (ibid.), this requires an analysis or assessment of the power and level of interest of the different potential stakeholder groups. Based on a model of the chain of corporate governance (Johnson and Scholes, ibid:186), between the employers who have to facilitate the initiative, the employees who have to participate in union learning representative activity, and the decision makers at national level who are driving the initiative, there is an immense distance (see Figure 1, below).

Johnson and Scholes (ibid.) suggest the model also identifies the information typically available to each stakeholder from which they can judge the performance of the other stakeholders. They suggest it is helpful to consider the extent to which stakeholders are likely to show an interest in the strategic development of the initiative [organisation] and/or seek to exercise an influence over its purpose and strategies.

Johnson and Scholes differentiate between internal and external stakeholders and this is a distinction that can be made in this research. This distinction has been identified via Figure 1, below. They go on to suggest external stakeholders might seek to influence strategy through their links with internal stakeholders. An example of this in respect of the union learning representative initiative is employers' influence on union learning representatives and individual colleagues, where the employer can choose whether to facilitate or not union learning representative activity and emerging learning and development opportunities. It is also suggested that individuals need to identify themselves with the aims and ideals of stakeholder groups. In this research, a consideration is the extent to which union learning representatives identify themselves either with the union learning representative initiative or, in the first instance, as a representative of their trade union with a particular role.

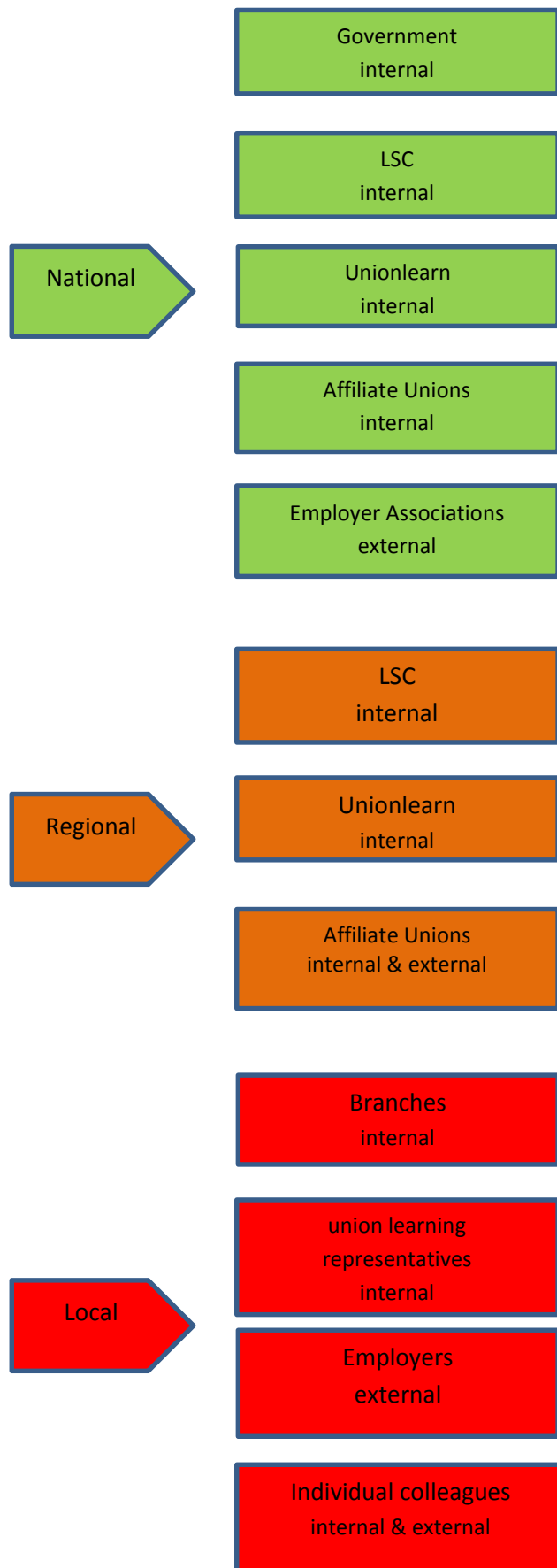
Figure 1, below, illustrates how internal and external PSHs relate to the union learning representative initiative. It has been colour-coded to represent a traffic-light system. This analogy has been applied to illustrate the stakeholders' apparent willingness to facilitate union learning representative activity and, in some cases, their ability to inhibit union learning representative activity. The model also presents the PSHs in their national, regional and local level roles. A further identifier is the internal/external distinction. This refers to the PSH's individual role, and whether it is internal and integral, or external and merely facilitating, the union learning representative activity. As discussed later in this thesis, the traffic-light system also facilitates the representation of the decision-making process during the establishment of the initiative:

'Green - for go' the rhetoric of the national level representatives of the PSHs

'Amber – get ready' to launch the idea via the buy-in of the regional level representatives of the PSHs.

'Red – for the reality' of the local level representatives of the various PSH groups whose buy-in and day-to-day activity is the only way that union learning representative activity is going to happen.

Figure 1: Chain of corporate governance for the union learning representative initiative adapted from Johnson and Scholes (1997:186)



Johnson and Scholes (ibid) provide guidance when identifying stakeholders and advise that it is important to concentrate on more than just the formal structure of the initiative. It is also necessary to identify the informal stakeholder groups and assess their importance, and to note that such stakeholder groups can present themselves differently depending on the issue related to the strategy. In respect of this initiative then, both individual line managers and individual union members are presented as 'informal' stakeholders, since both can be fundamental to the union learning representative initiative being put into practice within organisations yet neither have had direct input into the decision-making process by which it was decided that the initiative would be introduced into their workplace. Johnson and Scholes (ibid.) go on to say that it is:

"... specific events which trigger off the formation of stakeholder groups [...] stakeholder analysis is most useful when related to an assessment of specific strategic developments such as the introduction of a new product [new initiative]."
(Johnson and Scholes, ibid:197)

Stakeholder mapping can be useful for identifying stakeholders and establishing political priorities, especially in terms of managing stakeholder relationships. Johnson and Scholes (ibid.) suggest this requires judgements to be made on two issues:

"

1. *How interested each stakeholder [group] is to impress its expectations on the organisation's [initiative's] choice of strategies.*
2. *Whether they have the means to do so. This is concerned with the power of stakeholder groups."*

(Johnson and Scholes, ibid:197)

Johnson and Scholes (ibid.) go on to present a power/interest matrix as an analytical tool to assess the nature of the relationship the organisation [initiative] needs to establish with each stakeholder. It also helps to plan the political dimension of strategic changes. The stakeholders to the union learning representative initiative have been mapped onto the model in Figure 2, below.

Figure 2: Stakeholder Mapping: the power/interest matrix

Stakeholder Mapping: the power/interest matrix
 (Adapted from Johnson and Scholes, 1997:198)

		Level of Interest	
		Low	High
Level of Power	Low	A: minimal effort Members/colleagues	B: keep informed LSC union learning representatives Members/colleagues
	High	C: keep satisfied Employers Unions Members/colleagues	D: key players TUC (unionlearn) CBI Government

The justification for positioning the stakeholders in certain quadrants are as follows: high power/high interest, quadrant D, has to be populated by the TUC and the CBI as their work reported by the TUC in 1990 (TUC, 1990:1) caused them to lobby the then Conservative government to gain support for their idea. It is acknowledged that the CBI has not featured in the findings from the primary research and as an employers' body this positioning is at odds with the decision to place 'employers' in the high power/low interest quadrant. The political position this demonstrates, however, is fundamental to one of the main claims of this research, which is that, as a key originator of the initiative, the CBI has little influence over employers, but employers are fundamental to any union learning representative activity taking place in work organisations. The government has been placed in third place in this quadrant, because without government funding it is unlikely that a national union learning representative initiative would have been established.

Residents of the low power/ high interest quadrant B are the LSC, an agency of the government and of the government department that funded the initiative both at national and regional level. The LSC put government policy into practice. Union learning representatives are positioned here as they are the practitioners of the initiative but do not have a great deal of power over the operation of the initiative. This is one of the quadrants where members and/or colleagues might be found, depending on how much they buy in to the initiative locally.

The high power/low interest quadrant C is populated by employers and the affiliate unions. The affiliate unions are fundamental to the initiative becoming operational at national, regional and local level. The employers are, however, fundamental and crucial for the initiative being practised at local level. Furthermore, if union learning representatives are not able to be active at local level then other stakeholders are unnecessary. This is another quadrant where members and/or colleagues might be found, depending on the extent of their buy-in to the initiative locally. Johnson and Scholes (ibid:198) assert that the most difficult relationship to negotiate is between the stakeholders in segment C; the evidence from this research supports the assertion discussed above: without the buy-in of the affiliate unions and without the support of employers, the initiative would not succeed.

Finally in the low power/low interest quadrant A other union members and/or colleagues may be found, because, unless another stakeholder is in a high-interest quadrant, then there is little likelihood of this group experiencing union learning representative activity. It is also noted here that no primary data is available within this research project from union members/colleagues. There is however some evidence of their opinions via the perceptions of the other stakeholders.

Johnson and Scholes (ibid:198) highlight the need to assess the power of each stakeholder. Again, for the purpose of this research, it is the PSHs' power in relation to the union learning representative initiative that is being assessed. The sources and indicators of power are assigned by Johnson and Scholes (ibid:204) to being either internal or external to the organisation [initiative]. Within organisations (internal to the initiative, in this case) the status of a stakeholder might be indicated by its position in the hierarchy within that organisation/initiative; therefore, it is proposed that the PSHs highest in the hierarchy in the union learning representative initiative are unionlearn and, certainly at the establishment of the initiative, the CBI. As the initiative became operational, the government Department for Education and Skills (DfES), and, since 2010, the Department for Business, Innovation and Skills (BIS) were also at this high level in the hierarchy. Johnson and Scholes (ibid.) advise that it is also relevant to consider the reputation of a stakeholder among the others. Johnson and Scholes (ibid.:204) also identify as important a stakeholder's position in relation to the governance arrangements for the initiative. Representatives from unionlearn sit at the top table with representatives from BIS in negotiation of the annual funding for the union learning representative initiative. The affiliate unions and their branches, including the union learning representatives as members of those branches, can have influence (informal power) over the initiative.

The PSHs with control of strategic resources are identified as the government agency, DfES/BIS, in respect of funding. Originally TUC Learning Services, and then unionlearn with the TUC, had control of strategic resources via its access to the TUC's networks and operations. Again, as the initiative became operational, unionlearn's control of strategic resources increased significantly: it became the guardian of the initiative; it gained control of the management of funding (from 2006) allocated by DfES/BIS and thereby also gained control of its subsequent allocation of funds to affiliate unions in support of Union Learning

Fund (ULF) projects. The possession of knowledge and skills about and within the initiative belonged to unionlearn and the government agency at the establishment of the initiative, cascading to the union learning representatives and the affiliate unions as the initiative became established. The government is the PSH both internal to the initiative and with control over the environment where union learning representative activity is practised, thanks to legislation to support the initiative (Acas, 2003). Equally, unionlearn holds a similar position in respect of the training provided to give union learning representatives the knowledge and skills necessary to perform the role. The affiliate unions are an equally significant PSH within the workplace, and also through provision of union learning representative training and development programmes for their own union learning representatives. Finally, for PSHs internal to the initiative Johnson and Scholes (ibid.) refer to involvement in strategy implementation, describing 'exercising discretion' as an example of this. For the union learning representative initiative, the internal PSHs perceived to be involved in this activity are the government agency, DfES/BIS, unionlearn, and the affiliate unions. Thus, in respect of the indicators of power, stakeholders within the initiative are, as discussed above, aligned to the following indicators:

status and representation – government agency, unionlearn

claim on resources – LSC, unionlearn from 2006, unions

symbols - may be dependent on the size of union and possibly the 'wealth' of individual unions.

Johnson and Scholes (1997:204) identify PSHs external to the initiative and their sources of power. Sources of power in this context are the control of strategic resources, such as materials, labour and costs. In this instance, the power appears to sit fair and square with the employers. Alongside this is the level of involvement in strategy implementation via issues such as distribution outlets and agents. For the union learning representative initiative, this clearly applies to the affiliate unions and the employers. A further item is identified as the possession of knowledge/skills; the external PSH that might be seen as possessing this are the organisation's representatives in the Learning and Development/Human Resource Development (HRD) function. Finally in this category, there is the criterion of 'through internal links', where the example given is 'informal influence'. In respect of this initiative, employers with members/employees are identified, but it is acknowledged that in respect of the employment relationship there is formal influence

between these two PSHs. The indicators of power for external stakeholders are summarised as follows:

Status – CBI at the inception of the initiative

Resource dependence – employers

Negotiating arrangements – this is rather a complex situation in that employers expect unions to negotiate with them. The evidence suggests, however, that employers tend not to sustain union learning representative activity once there is an absence of ULF funding to support union learning representative activity.

Symbols – public displays of partnership between employers and their on-site unions. As the evidence demonstrates, however, this is often the response of senior managers. The response of line managers at a local level can be in contrast to this.

Monitoring and evaluating stakeholder satisfaction with the union learning representative Initiative.

Lovell (1993), cited in Bourne and Walker (2005:657), says it is crucial to understand the power environment within the initiative, the position of the actors (PSHs and others) and what their drivers are. It may be necessary for PSHs to adapt their actions and attitudes to be more in line with the initiative's goals. Nickols (2003:1) offers the following points as insight for this. Stakeholders have an interest in seeing the particular initiative succeed. The level of this interest is rooted in a quid pro quo, that is, a stakeholder puts something into the initiative (contributions) with the expectation of getting something out of it (inducements). Various stakeholders may agree about the kinds of results expected from the initiative, but they can hold very different opinions about what is important when it comes to evaluating the initiative. Nickols (ibid.) says their inducements are different. In order to evaluate and monitor the initiative adequately, it is necessary to assess the extent to which all stakeholder groups are satisfied with what they receive from it. Finally, the only way to ensure that all stakeholder groups are satisfied is to factor in their various requirements during the design, development and delivery of the initiative. Garavan's research (1995:30) investigated the philosophies, values, expectations and evaluation criteria used by both internal and external HRD stakeholders in respect of HRD (including training and development) activity in the workplace. He identified internal stakeholders as

the HRD specialist, the individual learner, the line specialist, top management and the HR specialist. His external stakeholders were identified as national training advisers, trade unions, external training providers and educational establishments. Garavan found evidence of a multiplicity of perspectives and issues, and that there appeared to be a considerable amount of common ground in some of the core issues, such as the involvement of line management, and collaboration in the training process. He found evidence of divergence in terms of the payback period on the investment to the organisation, the balance of provision in respect of individual vs. organisational needs, and the level of involvement of the line specialist. In comparing this stakeholder identification to that for the union learning representative initiative, the PSHs internal to the initiative are external to the individual workplace, thus it is likely that there will be significant power issues at play in facilitating union learning representative activity.

In considering the stakeholder principle, Garavan (ibid:45) considers the work of Evan and Freeman (1993, cited in Chryssides and Kaler, 1993) discussed earlier and suggests a steerer model of stakeholder management. The essence of a steerer model of HRD management is described by Garavan as:

“...the right and power to manage the HRD function is distributed among many individuals and groups.”

(Garavan, 1995:11)

Garavan proposes this should be practiced with two guiding principles. Firstly, Garavan proposes that the HRD function should be managed for the benefit of its stakeholders and the organisation. Key stakeholders' priorities must be considered and the stakeholders must have a mechanism to participate in decisions made by the HRD function. Secondly, the HRD function must act in the interests of its key stakeholders, giving priority to the long-term stakes of each group. He goes on to suggest some structural mechanisms that might be put in place to make a steerer model of stakeholder management practicable within an organisation:

“An HRD Project Group, a learning bill of rights and a statutory right to a minimum amount of training.”

(Garavan, ibid:45)

These can be seen as correlating with findings from other research into union learning representative activity (Hollinrake et al., 2008) in respect of learning institutions that support the union learning representative initiative within an organisation: the establishment of a joint management and union learning committee, and the negotiation and agreement of a learning agreement, which also identifies a minimum amount of paid time for training that individuals should be entitled to.

Conclusion

In response to the objectives that were set for this chapter, the literature that has been accessed has enabled the discussion to:

1. Provide evidence that the principle players in the union learning representative initiative can be termed as 'stakeholders'
- and
2. Identify techniques from stakeholder analysis literature that will support the analysis of the role of the PSHs within the union learning representative initiative.

There remain issues stemming from the inception of the union learning representative initiative, when individual employers and their representatives at the local level were not considered as stakeholders nor were they invited to join an 'advisory board' during the design, development and delivery of the initiative. This was despite the fact that the involvement of employers is essential to the effective execution of an initiative such as this. The employers' level of interest in the union learning representative initiative was largely an afterthought. Employers' lack of participation in the monitoring and evaluation of the union learning representative initiative to date, at both national and regional level, suggests that nobody has addressed this to any great degree. Perhaps the question to be asked is not what can the union learning representative initiative do for its PSHs, but what can the PSHs do for the union learning representative initiative? Considering this from the union perspective, in a discussion about whether or not unions are on 'the backseat of corporate sustainability', Salzmann and Prinzhorn, cited in Steger (2006:285), comment that in Europe unions have been central actors in both the political and economic field through their affiliation with the political labour movement, and whilst they remain powerful, the widespread impression is that their importance has declined since the mid-1980s.

Furthermore, there may well be a new role for unions as service providers and bargaining agents in local contexts. In this position, they would need to strike a balance between employer demands for productive efficiency and the legitimate desire of employees to cope with the stress of modern working life.

Chapter 3: Workplace Learning

This chapter considers the concept of workplace learning. The aim is to pinpoint what relevant research has identified about the role of the workplace for learning, employer influences on, and behaviours in respect of, workplace learning, and to look at individuals' attitudes and behaviours towards workplace learning. Then, from a consideration of these issues, this chapter will discuss the measures that commentators believe can support workplace learning. This knowledge and understanding will then be applied to the findings from the primary research, with the aim of identifying if union learning representative activity is facilitated or inhibited in similar ways to other workplace learning activity. In order to achieve this, the objectives for this chapter are as follows:

1. To identify the context of workplace learning.
2. To identify the reality of workplace learning.
3. To identify what barriers and/or enhancers exist in relation to the practice of workplace learning.
4. To identify strategies that could support workplace learning.

The chain of corporate governance; Figure 1(adapted from Johnson and Scholes, 1997:186), see Chapter Two page 29 and the power/interest matrix; Figure 2 (adapted from Johnson and Scholes, 1997:198), see Chapter Two page 31 introduced during the discussion on stakeholder theory in Chapter Two, have been applied in this chapter to demonstrate how the findings from the literature review can throw light on the impact of PSHs on union learning representative activity.

Stakeholder Mapping: the power/interest matrix (Adapted from Johnson and Scholes, 1997:198)			
		Level of Interest	
		Low	High
Level of Power	Low	A	B
	High	C	D

The above unpopulated version of the power/interest matrix is provided as a key for the definition of quadrants throughout this chapter. Within the text occupancy by a PSH will be referred to as quadrant A: B: C or D where:

A = low power/low interest

B = low power/high interest

C = high power/low interest

D = high power/high interest

The Context of Workplace Learning

According to Streeck (1989:97) the existing liberal, voluntary training regime in Europe was already weak in generating specific, dedicated skills. It is also suggested that, in the future, vocational training would not just be about the acquisition of manual and mental skills but would increasingly need to be:

“... a process of socialisation in work-related values, in a culture and community of work in which extra-functional skills like reliability, the ability to hold up under pressure and solidarity with others working at the same tasks are highly regarded and rewarded.”

(Streeck, *ibid*:98)

Streeck felt that, to take ownership of and internalise value orientations at work, people need role models, and that work-related skills and orientations are acquired not from professional teachers but from more experienced peers in the workplace. Furthermore, if high and broad skills were to be generated to preserve the European ‘culture of work’ in spite of ‘economic exigencies’, there would have to be a substantial contribution to industrial training by the enterprises. He believed that enterprises in the West had to become places of learning in addition to being places of production, because no other institution can do what they can do to produce the collective good of a large supply of work skills. Streeck argued that if only the firm can do what has to be done and if a voluntary approach is maintained, then history has demonstrated the necessary skills increase will not occur.

Ashton (2004) states that the UK government accepts that workforce development is the province of employers and individual workers and is therefore best delivered through the market. Furthermore the UK government only intervenes directly in the market in the case of market failures and initial youth training. According to Westwood (2004:53), the gap between what employers say and what they do has, however, caused significant problems for national vocational and educational training (NVET) policy. He suggests there needs to be a more evidence-based approach, because, until then, NVET policy is being built on sand. Grugulis (2007) observes that consensus exists, and reflects that governments, employers and employees all report favourable attitudes towards training and development, with decision makers urging everyone to ever higher levels of activity.

“Yet in Britain at least, participation lags far behind support. It is not that employers and employees are not aware of the advantages of training and development. They are. They simply choose not to engage in it.”

(Grugulis, *ibid*:3)

This is qualified with an acknowledgement that some sectors and firms do engage in extensive training but many others are much less active.

Rainbird (2000a) confirms that the workplace is significant as a place of both formal and informal learning. Billett (2001:19) discusses learning through work and confirms that there is long-standing evidence of the efficacy of learning in the workplace. Also, that prior to the establishment of vocational colleges and universities, most people learnt their vocations through work. He cites Felstead and Ashton (2000), who found that, where high performance working systems had been introduced, companies had been able to achieve high levels of workplace learning but noted that the employers remained in control of the agenda and learning was focused on performance improvement. Evans et al. (2006:9) define workplace learning as:

“... that learning which derives its purpose from the context of employment.”

(Evans et al., 2006:9)

They acknowledge that, for learning in, through and for the workplace, the needs of various stakeholders have to be addressed and they identify these stakeholders as:

“Employees, potential employees, employers and government.”

(Evans et al., *ibid*:10)

Rainbird (2000a) comments that workplace learning is at odds with the main function of workplaces, which is to produce goods and services, to deliver profits in the private sector, and to deliver to standard and to budget in the public sector. There is also the assumption that the employer and employees have a mutual interest in investment in the training and development of the skills of the workforce. Grugulis (2007) refers to the work of Keep (1989) and to that of Felstead and Ashton (2000), who suggest that skills may affect the way people are managed. Also, if employee development is seen as the litmus test of human resource management (HRM), once employees' skills are developed, softer HR practices, such as employee involvement, and reward and recognition policies, are more appropriate and more likely to be effective since they reward employees for using their skills. As Rainbird (2000a) states, these unitarist ideas of human resource management are not supported by the findings from empirical research in the area. Conflict between HR strategy and operational management can make it difficult for workforce learning strategies to be implemented. Also that, at the level of the workplace, this difficulty can be exaggerated by management through the socialisation and control of the workforce (Rainbird, 2000a:2). Grugulis (2007) suggests there is also a benefit for individuals in that workplace learning can encourage job satisfaction and facilitate progression in the labour market. Also, employees who participate in employer-sponsored learning and development are more likely to say they have career prospects and intend to stay with their employer. Hence it is acknowledged that some sectors and firms do engage in extensive training but many others are much less active. In addition, training, learning and development can be a double-edged sword with two extreme outcomes:

“... preparing a person for skilful, creative and autonomous work, increasing their earning potential and improving their status in society. It can also confine them to horizontal moves between a series of ill-paid and alienating jobs.”

(Grugulis, *ibid*:ix)

In their paper on the employment relationship and workplace learning, Rainbird et al. (2004) suggest that the workplace as a site of learning has to be understood in the context of power relations represented in the employment relationship. These issues may

encourage or discourage employers' investment in formal learning and the adoption of forms of work organisation that might encourage informal learning. Rainbird et al. (2004) argue that, to facilitate learning in the workplace, consensus and participation have to be constructed rather than taken for granted. They describe how the field of training and development has been identified as one of the more consensual areas of the employment relationship. They identify the members of the employment relationship as the state, the management and the trade unions; and, relating this to this thesis, these are also the PSHs within the union learning representative initiative. As Rainbird et al. (ibid) confirm, whether workers are employed in unionised or non-unionised workplaces, the employment relationship is governed by rules.

According to Rainbird et al. (2004), the influence of the employment relationship on workers' access to workplace learning operates at a number of different levels. The first of which is at the level of the state. Rainbird et al. (ibid) indicate that the state's influences on workplace learning are not only via the institutions of vocational training. The state also regulates the employment relationship by setting the framework of labour law, within which employers and trade unions bargain. A fundamental consideration is the state as an employer in the public sector. In this research project there is considerable representation of the state as the employer in the primary data on union learning representative activity in the North West of England. The next level at which the employment relationship is regulated according to Rainbird et al. (ibid) is at organisational level. The three perspectives of the employment relationship as identified by Fox (1966) are cited in Rainbird et al (2004:39). The unitarist perspective, where employer and employee are perceived to have similar interests. Secondly, the pluralist perspective where conflict is seen as inevitable due to the different interests of employer and employee. Thirdly, the radical or Marxist approach, which identifies the unequal nature of the power resources of management and labour. The way in which employee consent is constructed in the workplace is fundamental to understanding the employment relationship.

Harrison (2009) considers the uncertainty of outcomes from workplace learning: developments in the understanding of learning during the late 20th century challenged the traditional views of both behavioural and cognitive theorists and raised awareness that to train or teach does not necessarily result in the learner learning. Only the learner can learn.

Harrison presents an emerging body of theory, including social constructivism theories, which:

“... place the individual in the driving seat of learning, which it views as intimately shaped by the social relationships and culture that most directly influence the individual’s values, beliefs and perceptions of the environment.”

(Harrison, *ibid*:101)

Thus, to summarise at this stage, it is acknowledged that the workplace is a learning environment. The nature of a learning culture in the workplace is closely related to the nature of the employment relationship. Finally, the rhetoric of the extent to which members of the employment relationship profess to value learning and development is not always borne out by the reality in UK workplaces. Reid et al. offer an explanation in that:

“... a philosophy of training (learning and development) has its foundation in the cultural, economic, social and other values and experiences of the individual, organisation or nation. Yet the purpose of training (learning and development) is to promote change and often to disturb these values or to offer new experiences that outdate those that have been valued.”

(Reid, Barrington and Kenny, 1992:53)

This chapter is concerned with what happens within the workplace, the following section will consider the influence of the employer in workplace learning.

Employers and Workplace Learning

The employer is fundamental to the nature and extent of workplace learning that occurs. Employers as PSHs in the union learning representative initiative are the fundamental facilitator and/or barrier to union learning representative activity. A snapshot of evidence of employers’ attitudes to workplace learning begins with the findings from Coopers and Lybrand’s (1985) research. It investigated the attitudes to employee development of Chief Executive Officers (CEOs) and equivalents in a cross-section of organisations from blue-chip companies to small and medium-sized enterprises (SMEs). The findings identified that the organisations’ spokesperson had little knowledge of training activities within their organisation. Training was not a board-level interest. The responsibility for training was in

the lower levels of the hierarchy. Overall, training was viewed as an item of expenditure not an investment, and there was no evidence of the evaluation of the impact of training activity. There was little pressure from employees requesting opportunities for training and, when employers did train employees, then employers felt they were vulnerable to having their trained staff poached by their competitors. The employers had little knowledge of the detail or availability of government initiatives to encourage training opportunities in the workplace.

Furthermore, Sisson and Timperley (1994) cite Atkinson (1989) and describe firms' responses to skills shortages as sequential, introduced only slowly as the seriousness of the shortage problem becomes apparent. Also, more difficult and expensive responses only tended to be deployed when easier and cheaper responses had proved inadequate. The Director General of the National Economic Development Office (NEDO) is reported as commenting that:

"... the disappointing results indicate [...] that we are in for a bout of 'muddling through' British-style [...] many companies are chucking money at the problem and assuming that will do the trick [...] the unfortunate truth is that, at any rate in personnel matters [...] most employers live hand-to-mouth and the idea of taking a strategic view and of doing so at board level is quite alien."

(Cassells, 1989:6, cited in Sisson, 1994:170)

Grugulis (2007) refers to the example of the demographic time bomb discussed by Sisson and Timperley (1994). Despite dire warnings that the 1980s' 'buyers' market' in respect of the availability of young people for employment was going to disappear, it was extremely difficult to raise awareness of the problem among the management of many British companies. Only one in seven managements admitted to being well informed about the demographic changes. This eventually rose to two thirds who demonstrated awareness, but Sisson and Timperley report what was more concerning was the response to this apparent awareness. Some organisations had shown considerable imagination when addressing the issue but the majority had not. Less than one third of organisations surveyed had seriously considered looking at alternative sources of recruitment:

“Fewer still considered making radical changes in the existing working arrangements or provisions for re-training to help deal with the problem [...] For the great majority the preferred solution seemed to be to ‘compete’ rather than ‘adapt’.”

(Sisson and Timperley, 1994:170)

According to Warhurst et al. (2004), while a high-skill economy is desirable, it is not necessarily a logical management strategy. A low-skills, low-value-added strategy is one by which employers can both enter and compete in a market. The incentive for employers to move out of the low-skills section of the economy is not evident. Employers perceive there to be a supply of low-skilled workers, whilst the costs of training have to be set against other concerns and the threat of competitors poaching that skilled labour. A cycle develops of available workers, being utilised in low-skill work activity, producing low-value-added products. The low-skills equilibrium is reinforced and itself reinforces related concerns about employability and social exclusion. Attempts to promote employability and social inclusion through training are thus weakened. In 2003/04, therefore, there was too little pressure for firms to up-skill, as up-skilling would threaten some firms’ competitiveness in existing markets. For up-skilling to occur, changes would be required beyond the workplace (Keep, 1999 in Warhurst et al. *ibid*). In the conclusion to her book, Grugulis (2007:187) refers to the work of Lloyd and Payne (2003 and 2005), who propose that, while government promote a high-skills society and the need for better jobs, their aim and objectives for achieving this lack precision, and that each nation should not just follow best practice from other nations blindly, but should identify and facilitate the best fit for the local situation.

Wolf (2005), in a ‘Think-piece’ for the Chartered Institute of Personnel and Development (CIPD), states that there has never been a better or more important time to help employees improve their basic skills. Workplaces need to consider the skills of all of their employees and encourage unskilled and lower-skilled workers to improve their literacy and numeracy skills. Woolf advises that basic skills’ improvements can have an impact on productivity and assist employers in other ways. She states that, if it is accepted that employers need to address their employees’ skills, then senior managers, HR and training professionals need to identify the appropriate strategies for improving basic skills, including identifying any

financial help that is available and how to deliver basic skills training. Woolf also suggests that:

“Employee engagement is vital and that ULRs can play a crucial role in persuading employees of the value of attending a course.”

(Wolf, 2005:14)

Harrison (2009) presents a framework for improving workplace learning: the ‘expansive – restrictive framework’ proposed by Evans et al. (2006). The aim of the framework is to:

“... enable the identification of features of the environment or work situation that influence the extent to which the workplace as a whole creates opportunities for, or barriers to [...] learning [...] However, all employees [...] would benefit from and contribute to [an] expansive environment, which will enhance the extent to which employees at all levels share their skills and knowledge and have access to learning opportunities with and beyond the workplace.”

(Harrison, 2009:127)

Evans et al. (2006) refer to the model as the expansive-restrictive continuum and suggest it can be used by organisations to analyse the extent to which they might improve the quality of the learning environment for the whole workforce and make recommendations for improving learning support and practice. They do not provide any indication as to when in the learning process the need for this support would be assessed.

Figure 3: The Expansive-Restrictive Continuum

Expansive	Restrictive
Breadth: access to learning fostered by cross-company experiences built into programme	Narrow: access to learning restricted in terms of tasks/knowledge/location
Post-learning intervention vision: progression for career	Post-learning intervention vision: static for job
Explicit institutional recognition of, and support for, employee’s status as learner	Ambivalent institutional recognition of, and support for, employee’s status as learner

Learning intervention is used as a vehicle for aligning the goals of developing the individual and organisational capability	Learning is used to tailor individual capability to organisational need
Learning intervention design fosters opportunities to extend identity through boundary crossing	Learning intervention design limits opportunity to extend identity; little boundary crossing experienced
Reification of learning highly developed (e.g. through documents, symbols, language, tools) and accessible to learners	Limited reification of learning, patchy access to reificatory aspects of practice

Adapted from Evans et al. (2006:34), cited in Harrison (2009:129)

Harrison cites Evans et al. (ibid:163), who claim that the starting point in the application of the expansive-restrictive continuum is at analysis of the three levels of context that influence learning in the workplace. The first level of context is macro-level social structures and social institutions where the collective actors include government, unions, professional bodies, sectoral and local-level training and learning agencies. Their second level of context is the organisation. According to Evans et al. (2006), in most UK organisations workers' learning is not a priority and represents a third-order decision, the first-order decisions being market and competitive strategy, the second-order decisions given are strategies relating to work organisation and job design. They state that third-order decisions usually have a short time frame. The third level of context is at the individual level. This level considers what influences the extent to which individuals take advantage of [learning and development] opportunities afforded by their immediate work environment.

The 'actors' identified in Evans et al.'s 2006 model correlate with the PSHs identified in this research. Harrison reports that:

"One conclusion reached by the research is that while analysis will often identify a range of areas where action can fruitfully be carried out to enhance workplace learning, this will not always be the case. Sometimes it may reveal too many unfavourable features of wider context to make local action feasible or advisable at the particular point in time."

(Harrison, 2009:128-129)

Ashton (2004) suggests that, in skills terms, it would be worth listening to those who have made efforts to advance the learning of individuals and therefore organisations; in addition, he identifies that there is a ready-made government measure that would suit this purpose: Investors in People (IiP). Westwood (2004) reminds us that employers' views are usually made known by membership bodies that canvass their members' opinions on issues. Business bodies are by definition representatives of their membership, therefore the views of both the best and worst are reflected in their reports. Thus, according to Westwood (ibid), the advice of bodies such as the CBI (Confederation of British Industry), IoD (Institute of Directors), CIPD and FSB (Federation of Small Businesses) should be handled with appropriate care. As Westwood (ibid) suggests, there is a need to be able to sort the real issues from the hype by listening to and learning from organisations that are worth the attention. In addition, there is a need for government to address levels of qualities and skills, and a vital need to develop models that bring together both worlds - that of reality and that of rhetoric.

Ashton (2004) continues that, given the UK's skills problems, it remained the case that only 32% of workplaces with ten or more employees were IiP accredited by 1999. By June 2001, 39% of the workforce were represented by an accredited organisation. This evidence is presented with the caveat from Hoque et al.'s (2002) work, cited in Westwood (2004) that some employers may be merely 'badge collecting'. Westwood (2004) goes on to make the point that surely any employer taking up a role in driving the UK's skills policy should at least have an IiP-accredited company. Again, he cites Hoque et al.'s (2002) work that found employers and their representative bodies appeared to like IiP, so therefore it would make sense to bring in an IiP-accreditation requirement. Grugulis (2007) refers to a number of authors (Keep, 1994; Heyes and Stuart, 1981; and Rainbird, 1990), who have observed that unions and professional associations have been some of the most enthusiastic supporters of training and accreditation. Ashton (2004 in Rainbird et al., 2004) supports this view, stating that the main official policy mechanism for supporting workforce development in the UK is the Investors in People (IiP) award. The IiP award provides:

"... a template for best practice in the field of human resource development [HRD]."
(Ashton, 2004:27)

In addition, it provides certification for those organisations who meet the standard. He goes on to say that liP had only reached a small percentage of employers but had been achieved by a substantial amount of larger employers. This is still, however, a broad initiative to encourage good HRD practice but there was, and still is, nothing on the liP standard which:

“... explicitly encourages employers to use the workplace per se as a source of learning.”

(Rainbird et al., 2004:27)

Evans et al. caution, however, that:

“... because so many different factors are involved and interrelated, the actual nature of workplace practice and workplace learning can look very different from one workplace to another, even within the same organisation.”

(Evans et al., 2006:174)

This suggests that when considering a universal approach, such as liP, then it is important that it is applied to achieve the best fit in that context and not just ‘bolted on’ to what already exists in the assumption that ‘one size fits all’.

The Rhetoric vs. the Reality of Workplace Learning

Evans et al. (2006) argue that the rhetoric of workplace learning is not even an aspiration in comparison to the reality of the working environments of many public and private sector organisations. And yet, in the discourse of HRM, the more sophisticated representations of organisational learning, such as the concept of the learning organisation and knowledge management, suggest that learning is a central concern in the workplace. They also suggest that adult learning in and through the workplace is active and its coverage is related to the extent it is facilitated in the workplace. With regard to the activities and guidance that individuals can access, Evans et al. cites Billett (2004), who explores the experiences of adult workers and concludes that:

“... individuals’ agency determines how, what workplaces afford, is construed and judged worthy of participation”.

(Billett, 2004, cited in Evans et al., 2006:18)

So, for the union learning representative initiative, it could be claimed that getting the hard-to-reach learners involved would require encouraging them to perceive learning activity as something that would be an individual development tool (Van der Krogt, 1998:161). But then their expectations, maybe even their psychological contract with learning, would have to be managed when the application of the outcomes from their interest in learning is then considered as a tool of management, by the management in the workplace.

In explaining the realities of the workplace, the work of Van der Krogt (ibid) has been considered. He presents the concept of learning network theory, which considers the tension between learning systems and work systems in organisations. He suggests that as people other than trainers become more actively involved, how to manage the learning system becomes a more complex issue. He explains this as follows. The environment of the organisation is a network of actors – individuals, groups and other organisations. The internal actors interact with external actors: clients, suppliers, public bodies, social partners, and government agencies. A further (third) element that has to be considered is the learning climate, the origins of which are the interactions between the actors. According to Van der Krogt (1998), there is probably not a single system that depends so heavily on the views and dedication of the actors involved as much as a learning system. His learning network theory suggests that learning actors, and especially the learners themselves, desire and have the capacity to influence processes in the learning system based on their views of the content and the organisation of learning. Poell et al. (2000) explain that learning network theory is a descriptive theory that allows employees, managers, training consultants and other actors to understand and develop alternative ways of organising employee learning in relation to work. It is not a prescription of how learning should be organised. It is action based and offers actors various organising options to consider as well as insight into what dynamics might occur when certain options are pursued.

The Opportunity to Participate in Workplace Learning

As regards the opportunity for the workforce to participate in workplace learning, the Fryer Report (Fryer, 1997) states that the ESRC (Economic and Social Research Council) held the view that the UK was not at present a learning society, nor did it have a culture of lifelong

learning or even a training culture. The report goes on to say that the CBI (1997) stated that the UK's progress in education and training was still inadequate. Fryer reports on the 1997 Labour Force Survey, which found that only 14% of all employees were taking part in job-related training. One third of all employees said their employer had never offered them any training. The DfEE (Department for Education and Employment), reporting on learning and training at work in 2000, found that three in four employees received no off-the-job training and that only 26% of workers had been given off-the-job training in the previous twelve months to late summer 2000. However, eight in ten employers claimed the skills of their workforce were rising, but only six in ten reported that all of their workers were fully proficient. The Department for Education and Skills (DfES, 2006) found that 61% of employers had provided training for their employees in the previous twelve months, and that training was more prevalent in organisations with over 100 staff (79%). Three fifths of all employees had received training in the previous twelve months and this was most likely to be provided in higher level occupations. The Employer Skills Survey 2011 (UKCES, 2011) found that 66% of employers had provided on- or off-the-job training for some staff in the last twelve months and employers had funded or arranged training for 53% of the total workforce. Customer service and elementary occupations were most likely to have skills gaps but employees in those roles received training no more than the average. The reporting of these findings is interesting. In 1997 and 2000, it was the percentage of employees participating that was reported; by contrast, the figures for 2006 and 2011 report the percentage of employers providing training, but it is not clear what percentage and areas of the workforce were being offered these opportunities.

Rainbird (2000a) reports that occupational hierarchies within organisations impact on how likely certain members of the workforce are to have opportunities for learning provided by their employer. Grugulis (2007) develops the discussion, considering who gets opportunities for learning and development. This supports the evidence presented in the NVET policy chapter of this thesis, that it is those who are highly educated who are more likely to gain opportunities for learning and development at work (see also: Evans et al.; 2006, Harrison, 2009; UKCES, 2009). According to Grugulis (2007), the two types of training most commonly funded by employers are health and safety and induction training, which, as she observes, might explain why figures from the DfES (2003), found that temporary workers (20%) were more likely to receive training than their permanent colleagues (15%).

While they are fundamental in the workplace, health and safety and induction training are unlikely to affect productivity, quality or performance, nor provide career development for the individual. According to Rainbird (2000a), some workers/occupational groups enter the workforce with expectations of access to learning and career progression. Likewise, some enter jobs with little opportunity for learning and progression. The attitudes and behaviours of their managers reinforce their own low aspirations for themselves. Rainbird (ibid) also discusses the various symbolic dimensions of learning and development opportunities according to different members of the workforce. For some, it is seen as reward or recognition, however, for others, it can be perceived as a threat, an indicator of poor performance, or maybe the precursor to work intensification.

Warhurst et al. (2004:10) cite Grugulis (2003), where it is found that competence-based qualifications were most likely to be undertaken by people disadvantaged in the labour market and that competence-based awards may act as a ceiling on advancement not a springboard for success for such groups. They observe that, as workers and employers see a gradual widening of the concept of what skill is, they redefine the degree to which more and more jobs can be seen as being skilled. With the caveat that this is 'skill' as a rhetorical device, and that it carries no material benefits. Social skills, though demanded by employers, as presented by Streeck (1989) above, carry no wage premium. Warhurst, (ibid:10) continue to explain: policy makers endlessly claim skill levels are rising but that the economy needs to invest in higher levels of skills and qualification than ever before. Individuals absorb these messages and report themselves as using higher levels of skills, reinforcing policy makers' belief that economic activity is being transformed into a knowledge economy. Policy makers then recalculate their projections of future skills needs and redouble their pronouncements that skills level are rising and will rise further. This creates the potential for a self-fulfilling prophecy. They provide the following example:

"... a sales assistant in a chain store, say Marks & Spencer, 30 years ago the job would be regarded as a low-skilled, non-manual occupation, today the evaluation would be different, stressing the interpersonal and customer service skills that make the job more skilled. But the content of the job has not changed. The use of what is broadly termed IT, but is operating an electronic till, and using a bar code scanner,

strip out intellectual exercise, and reduce the application of mental arithmetic. The moral of the story being that the importance of IT skills can be overplayed.”

(Warhurst et al., *ibid*:11)

This evidence suggests that there is a need to be realistic and honest as to the nature of workplace learning being offered. It is important to be clear which skills are actually being developed and how new work practices can sometimes de-skill employees.

Gill (2005) surveyed 750 people who had participated in a training activity, at work, during the previous twelve months. The aim of this CIPD survey was to determine the individuals' perspectives of the availability, relevance, success and preferred learning methods related to the training activity in which they had participated. The findings are in line with those reported above. Those who received the most training were in organisations with 500 or more employees, were working full time, and had a degree. Young people (16-24 years of age) participated in more training than those over the age of 25. When asked who initiated their participation in the training activity, only 17% had initiated it themselves and this was more likely for respondents who had a degree. Line managers were seen to have a crucial role in participation rates, since 45% of respondents said their participation was initiated by their line manager, with a third reporting that training had been initiated by the HR or Training Department. Over 90% reported that the training in which they had participated over the last twelve months had helped them to do their job better. As Gill comments, this confirms the importance of training in the workplace and the value that employees place on being given training and development opportunities. The most common delivery method was in a classroom or meeting room (54%). According to the respondents, the best method of learning was being shown how to do things and then practising them. The least appealing methods, recorded at 18-22%, were: eLearning via the internet, correspondence courses, watching videos, and reading books/articles. This provides evidence that learners have a preference for active rather than passive learning. The findings do provide some food for thought as to how basic skills training might best be received by participants, i.e. via more active methods of delivery.

The evidence presented in respect of who gets the opportunity to participate in workplace learning identifies that the colleagues of many union learning representatives will be in the

category of those less educated and less skilled employees who do not typically receive such opportunities. This raises the issue that, for the union learning representative, it is not just about getting the employer to provide relevant opportunities for learning and development: there is also likely to be as fundamental a role in encouraging colleagues to consider participating in learning and development interventions. This chapter will now consider what have been identified as barriers and facilitators to workplace learning.

Barriers and Facilitators to Workplace Learning

A report produced by UKCES (the UK Commission for Employment and Skills) (2009) provides evidence of barriers to individual engagement in skill development. These are identified for people in work and for the unemployed. For those in work, issues of organisational culture, policies, opportunities and resources were barriers. For the unemployed, existing low levels of education and cost considerations were significant barriers. The report cites Snape et al. (2004), who split barriers to individual engagement into intrinsic and extrinsic factors. Intrinsic factors were: the preference to spend time doing other things, a perception of being too old to learn, not being interested in learning, having insufficient knowledge about learning opportunities, and nervousness about returning to the classroom. The report also cites Sargent and Aldridge (2002), who add to the list with work or other time pressures, and the perception 'I have no need to learn anymore'. Work by CEDEFOP (the European Centre for the Development of Vocational Training) (2004) is referred to, and this reports a lack of interest as the main reason, alongside family-related obstacles, and again the perception of being too old.

Individuals identified extrinsic factors that prevented them participating in learning and development activity as: cost, time and work-life pressures, and children or family responsibilities. They also reported a lack of employer support, lack of appropriate provision, plus cost, and problems in getting time off in order to participate. Other factors were domestic and personal/work-related issues (UKCES, 2009:41).

In the same report, employers identified barriers to the provision of opportunities to engage in skills development as: perceived disruption to work activities, lost productivity, financial cost, and just normal work pressures. Employers feared that trained staff would leave or be poached or demand salary increases. As discussed earlier in this chapter,

employers lacked knowledge of the provision available. They also reported that there was staff were reluctant and lacked motivation to participate among staff.

The report (UKCES, *ibid*) cites the work of Munro et al. (2000), Rainbird et al. (2004), and McBride et al. (2006) in respect of problems negotiating time off especially for front-line staff. There was evidence of changes to the employment relationship (for example, employers requiring more flexibility from the workforce that resulted in evening and weekend work), where there are fewer opportunities for learning. It was found that unequal access was often due to specific views of line managers, who may, for example, view investing in training for older workers as an inefficient use of resources. Concerns amongst learners and managers were reported regarding the value of NVQ-oriented training. This was seen by some managers as a means of promoting the integration of low-skilled workers rather than as an effective mechanism for delivering skills. There was a lack of recognition amongst managers of the need for skills development within the workforce. Also there was a general lack of management capacity to provide opportunities for skills development. As the report states, this is against a backdrop of decision-making on work-related training being increasingly devolved to line-manager level. This is along with the impact of the lack of expert knowledge on learning/training issues amongst line managers. The report (UKCES, 2009) cites Eraut and Hirsch (2007), who suggest that managers need to understand that providing an appropriate level of challenge is important for developing confidence and job performance and that their support and feedback will be critically important for workplace learning. Thus they argue for appropriate management learning so managers are confident in preparing challenging tasks for their staff and are supportive in facilitating learning and training in response.

Streeck (1989) discusses the impact of age on employees' willingness to participate in learning. He suggests that deferring gratification of the value of investing in one's own learning assumes a degree of certainty as to what one is likely to need and value in the future. Streeck (*ibid*) suggests this is why young people are better able to learn than adults. Streeck applies the term:

“Why one cannot teach an old dog new tricks is not that the dog is old but that he wants to remain the kind of dog he has grown to be.”

(Streeck, *ibid*:92)

Billett et al. (2011) report on a study of Australian employees, all of whom were aged 45 (the age at which Australian workers are categorised as ‘mature age’ workers). Assuming no change in existing work and retirement patterns, the ratio of older people who are not working to those in the workforce will increase from approximately 38% in OECD countries in 2000 to just over 70% in 2050. Billet states that sustaining the employability of older workers is one way of maintaining a sufficiently productive workforce. He claims that literature consistently reports negative attitudes from employers about employing and retraining mature age workers. Their findings contest some existing views in respect of the extent to which these workers are regarded as employable, competent, adaptable and able to respond effectively to emerging workplace tasks.

Older workers were found to be more concerned with contributing than promotion. This research found such individuals wanted to contribute to their workplace via mentoring and supporting other workers. Billet et al.(*ibid*) suggest that the challenge for HRD professionals might be to capture this interest and these workers’ capacities and thereby contribute to the employability of these workers and also to more effective workplaces. Billet et al. (2011.) conclude that, alongside issues of age per se, status of employment and the size of the organisation were influential factors in individuals’ access to training opportunities.

Crouse et al. (2011) looked at the professional development of HRM practitioners and identified workplace learning strategies, barriers, facilitators and outcomes. The majority of participants were educated to graduate level, thus according to commentators they are in the section of the workforce who are more likely to receive learning and development opportunities (Evans et al., 2006; Grugulis, 2007; Harrison, 2009; UKCES, 2009), and consequently the study provides a useful comparison to the strategies, barriers and facilitators experienced in union learning representative activity. In addition, human resource practitioners are often the gatekeepers to procedures that can support union learning representative activity in the workplace. Both formal and informal strategies were identified. Formal strategies for workplace learning included taking courses, and examples of informal strategies included job rotation and learning on the job. Informal strategies

were found to be used more than formal strategies. Six types of barriers to workplace learning strategies were identified. Five refer to resource constraints – lack of time or high workload, lack of money, not having implemented sufficient technology processes, accessibility, and geographic location. The sixth barrier was identified as personal factors, such as a lack of interest on the part of the learner. Crouse et al. (ibid.) conclude overall that learning was important for the participants and their organisation, and cite Kock (2007) to evidence that learning can help develop competitive advantage for the organisation.

Billett (2001) says it has to be acknowledged that not all workers are willing participants in the learning process. What needs to be considered is how such reluctance can be overcome. He provides an example of two workers who were reluctant to participate with a formalised programme because of their low level of literacy skills. Others were reluctant because of the potential embarrassment if their performance was low in the assessment linked to the formalised programme. Billett, (ibid) cites Billet, (1995b) gives an example of coal miners who were suspicious of health and safety training as they perceived it as a way to shift liability onto the workers. He also suggests another reason for non-participation could be a lack of engagement with the values of the subject and/or the organisation. The research by Gill (2005) discussed above, found the key reason for people turning down opportunities for training were that they were too busy and/or they did not have enough time (43%). Over a quarter of respondents reported being sent on training that was not relevant to their job. It was also found that women were slightly more likely to turn down the opportunity for training than men.

Evans et al. (2006) report that their 2002 research suggested organisational and cultural barriers to the promotion of individual and organisational learning, such as:

“Cost-based competition, standardised products and services, a heavy reliance on economy of scale advantages, low-trust relationships, hierarchical management structures, people management systems that emphasise command, control and surveillance, an underlying belief that people are a cost or a disposable factor of production, little slack or space for creativity, a blame culture where mistakes (particularly of lower status workers) are punished.”

(Evans et al., ibid:11)

The evidence presented above identifies that there is a hearts and minds issue to be addressed in encouraging both the facilitators of and the prospective participants in learning and development opportunities within the workplace. It also suggests that people are not always looking for grandiose development interventions. Colleagues with expert knowledge and skills might be willing to be given the skills to share their knowledge and skills effectively. What people do rely on, however, is their workload being managed effectively to release time for learning and development activity. This is a management responsibility, and it takes the discussion back to issues related to the nature of the employment relationship, and whether or not managers are likely to facilitate this depends on this relationship.

Approaches to Support and Enhance Workplace Learning

According to Harrison (2009:103), an expanding body of literature points to the fundamental importance of the social basis of learning and the social relationships that influence individual learning. Harrison stresses a fundamental characteristic of the situational approach to learning is that the learning takes place in authentic settings, like workplaces where learning is also social in orientation.

A notion of organisational learning referred to by Harrison (*ibid*:131) illustrates one of the most significant influences on workplace learning. This is the relational school of strategy research, where the vital context is provided by the employment relationship. Harrison suggests this is mainly British in origin and cites the work of Scarbrough (1998:227). Scarbrough states that the whole organisation is nested in an institutional context that includes professional and sectoral networks, which in turn allow or hinder the transfer of knowledge across sectors, and so fundamentally influence learning and knowledge within the organisation. Scarborough (1998) cites Huff (1982) and Child's (1988) view that firm-level change is based on shared knowledge and 'recipes' as much as on unique organisational competences. They conclude that the more organisations interact with one another the stronger the tendency to adopt shared belief systems and common frames of reference. Harrison goes on to suggest that this is why the work of Evans et al. (2006) places so much emphasis on the need to understand where an organisation currently fits on their expansive–restrictive framework when considering introducing changes to

workplace learning Ashton (2004) also suggests that the liP framework, if practised in the spirit in which it is intended, could also facilitate this.

In respect of the union learning representative initiative, the nature of employment relationship at national level has been shown to have an impact on how UK companies responded to the initiative. Similarly, in the North-West region of England, within individual organisations, the nature of the employment relationship impacts on how the employer, or their local representative responds to a union's request to practise union learning representative activity in that organisation. Given that, at the time of the research outlined in this thesis, the majority of union learning representatives in the region worked in large, public-sector organisations (such as: the Department of Work and Pensions (DWP), local authorities, HMRC (Her Majesty's Revenue and Customs), and the NHS), it is likely that the employers and their representatives shared information with each other as to how they were responding to such requests and the extent to which they were being facilitated. This suggests that realistic case studies of examples that had a positive impact on workplace learning could offer shared knowledge and something of a 'recipe'. It must be acknowledged that examples of bad practice would also likely be shared across such networks, resulting in a barrier to support for union learning representative activity.

Evans et al. (2006) go on to identify what can facilitate participation in workplace learning. They identify constructivist and sociocultural theories of learning as those that can best support the understanding of workplace learning. Stewart and Rigg's (2011) summary explains these theories. Constructivist learning theories are situations where people 'construct' their own personal meaning by integrating new ideas and experiences into their previous knowledge. With this way of learning, individuals are actively creating their own understanding, using 'constructs' to represent the world. This requires the trainer/developer to design interventions that help learners make sense of new experiences. In their summary of sociocultural theories of learning, Stewart and Rigg (ibid) refer to the work of Vygotsky (1978). Sociocultural theories of learning emphasise the role of social aspects of learning. This theory sees the social environment and the existence or absence of a culture for learning, as well as interaction and communication between people, as crucial for learning. It is through dialogue with others that people make sense of new ideas and are able to give them meaning (social constructionism).

Evans et al. (2006) emphasise the significance of the context and the environment in facilitating learning, skill and knowledge, and they highlight the significance of power relations in the learning environment. It is not within the scope of this research project to investigate specific examples of learning in the workplace, but it is relevant to consider the context and environment and what needs to be in place to encourage members of the workforce to consider participating in learning and development activity. Furthermore, it is also relevant to consider that situated theories of learning appear to enable a more holistic understanding of workplace learning that goes beyond:

“... the parallel tracks of vocational and social pedagogy [...]”

(Evans et al., *ibid*:12)

Evans et al. (*ibid.*) cite Evans and Niemeyer’s (2004) discussion of how social and vocational disengagement occurs and how people may be reconnected through situated learning. A caveat is given that the original concepts of situational learning must be considered and the application of these should be made appropriately, in an attempt to better understand workplace learning. According to Evans et al. (2006), situated learning theories shift the focus from the individual to the social components of learning, with capacities developed through participation, and acquiring the cultural attributes of participation. In vocational education and training VET programmes, an important socialising task exists alongside skill and knowledge development. When learning is considered as a social interaction, in a learning community, there is a revised role required to facilitate and support the activity. Evans et al. (*ibid*:16) refer to this in relation to the role of teachers and trainers becoming coaches, advisers and mediators. It is posited here that such a construct is likely to exist between union learning representatives and their colleagues and thus approaches associated with situational learning could be applied to encourage employees’ buy-in and ownership of learning and development experiences. This scenario would see union learning representatives in the role of facilitator at the identification of learning and development needs stage via a solution-focused coaching approach and similarly at the evaluation stage of the learning and development process. This would provide a level of evaluation that is typically not afforded to the learning and development experiences of such members of the workforce.

Harrison (2009) presents some challenges to situational theories of learning. These will be considered in light of the author's existing knowledge and understanding of the union learning representative role in the workplace. The issues are based on Boud et al. (1993), cited in Harrison (ibid:104). The first issue to be considered is that of the learner actively constructing their own experience. As Harrison identifies, in many learning situations it is impossible to let learners move entirely at their own pace or to determine the content of their learning, if they have not got the knowledge or experience to do so. This would appear to be an issue that would apply to both union learning representatives and their colleagues. Secondly, there is the issue of learning being socially and culturally constructed. Harrison cites Wiltshire (2005) and asks about failure to learn? It can leave learners blaming themselves, or being blamed by others. This could be a self-fulfilling prophecy for union learning representatives and their colleagues based on previous learning experience. This suggests that what might be required in the union learning representative situation is a situational approach to the identification of needs and engagement with the learning intervention. The monitoring and evaluation process also needs to be structured to ensure learners do not necessarily take the blame for failures to learn.

Poell and Van der Krogt (2010), cited in Billett (2010), consider how social networks in organisations contribute to employee learning. As part of learning network theory (Van der Krogt, 1998, 2007, cited in Poell and Van der Krogt, 2010, and in Billett, ibid.:200) two actor networks are identified as relevant to individual learning. These two networks are firstly the work network in which individuals carry out their everyday activity and secondly the learning network. As part of the learning network, employees participate in, for example, especially designed programmes, in order to learn. It would also appear relevant to propose that there might be other less formal activities where the learner network might operate and individuals would learn, for example, from their colleagues. Individuals' learning experiences in both networks can lead to individual employees creating their own learning path (Poell, 2005, cited in Poell and Van der Krogt, 2010:198 in Billett, ibid.) Evans et al. (2006) suggest that workplaces offer informal learning opportunities as a result of the interactions of members of workgroups and the structure of the work environment. They recognised that a challenge for the future was:

“... identifying strategies to assist workers who support the learning of others [...] to connect their learning to broader frameworks than those offered by their work roles [...] to help them go beyond their immediate context and to appreciate the wider relevance of their work activity and the learning it has fostered.”

(Evans et al., *ibid*:10)

According to Poell (2012a), there is more to HRD and workplace learning than viewing them only as tools of management. HRD and workplace learning are continually contested domains, which all actors try to influence all the time. He questions why non-managerial employees should not use HRD to further their own interests, beliefs and purposes as well. He sees it as HRD's responsibility to take account of both management and employee interests equally. Further, he states, at the core of his thinking is the notion that individuals create their own learning path. He defines a learning path as a set of learning activities that are both coherent and meaningful to the employee. Employees are the ones who can create these learning paths by taking action through engaging in work experiences that are relevant to their learning. Individual learning paths are employee driven and influenced by participants' work experience and participation in learning programmes. These learning paths are 'discovered' by employees' 'sense making' via reflection on their past experiences. Thus learning is action and reflection combined. Poell concludes by posing what he views as two crucial questions. Firstly, how do employees' HRD strategies interact with those of managers, HRD practitioners and other organisational actors? Secondly, how do the interactions among the HRD strategies of actors differ across sectors, occupations and work types? He suggests that responding to these questions will ultimately help HRD make a credible impact on the diverse and messy world of organisations. It is felt that this is an issue worthy of consideration for the union learning representative initiative, as the concept of individual learning paths and their initiation and support could be useful in considering how to engage learners in the workplace, with union learning representatives facilitating opportunities for the necessary reflective activity.

This raises questions, in respect of the research presented in this thesis: is there then an advocacy role for union learning representatives in the championing, monitoring and evaluation of learning and development strategy and policies within organisations? And, if so, can union learning representatives influence those strategies so they are implemented

in the spirit in which they were intended, and so consultation and negotiation takes place as and when required to ensure they are 'best fit' for the organisation and its employees. If this is the case, as proposed here, then there is a role for the union learning representative that might be different to the one that was originally identified by the TUC and the CBI (TUC, 2004) and that specified in the Acas 2003 and 2009 guidelines (against which the primary data from this research has been analysed). The role of the union learning representative might then be one of a solution-focused coach, working with colleagues on a one-to-one basis to encourage reflective practice to support them in identifying their own learning path, rather than one where the union learning representative is expected to be an 'expert' in the learning and development process. This shift of role would introduce knowledge and understanding of reflective activity and coaching skills into the learning and development requirements for union learning representative certification to practise.

According to Poell (2012b), the contributions of actors to the HRD process become institutionalised. These can be the HRD process introduced by HRD practitioners or new ways of collaborating initiated by employees. Such new elements to the HRD process are likely to be incorporated and the actors will start operating in the processes according to these new patterns. Poell (ibid) suggests this will embed new impetus into existing structures and become the norm. He describes the three dimensions of this concept of learning-network theory as follows:

“Vertical networks provide actors with security and stability, horizontal networks are high in mutual support among actors, and external networks can bring actors innovative insights developed externally.”

(Poell, 2012b:527)

Evans et al. (2006) state that most workplace learning takes place informally through everyday working practices; thus strategies and measures need to enhance the qualities of this broader environment. The realities of the workplace have to be dealt with not ignored, especially when universal top-down systems and solutions seem popular and yet there is increasing individual responsibility for learning. The improvement of learning through facilitation not control should be considered. A dual-track approach could be facilitated, one which pays attention both to the context of learning and to the individual learner. Their

conclusion might seem idealistic, but Streeck (1989) refers to a role in German workplaces, that of the 'Ausbilder', who is the person in a firm who is in charge of training apprentices. Ausbilders require a training licence and other training and qualifications to support their training function. They do not usually work as full-time trainers but are normally working alongside other employees in the firm's everyday activity. A suggestion at this point is that there might be scope for a similar role to be built into relevant areas of UK organisations, but for the support of colleagues' learning, training and development, not just that of apprentices.

This concept of actors in the HRD process could be applied to the PSHs in union learning representative activity. Where the concept appears to fall down in reality, however, is when actors on a different dimension of the learning network do not support the activity of others, e.g. line managers with union learning representatives and their colleagues, or line managers in response to PSHs on the external dimension. Poell (2012b) acknowledges such situations and goes on to suggest that the challenge in network development is giving actors sufficient room to act and interpret structures to enable them to bring new impetus to HRD processes. Furthermore, he proposes that coalitions between internal and external actors are driving forces in network development. He suggests another way for actors to introduce more dynamics is to work to reduce their problems in the process, but the perceptions and interpretations of what the problems are need to be taken seriously in order for such action to succeed. Poell recommends that actors/PSHs should 'stand in each other's shoes' to appreciate different perceptions and interpretations of situations. He concludes that both structure in the organisation and interaction between actors matter:

"Actors can escape existing structures by bringing new elements into HRD processes, which may become institutionalised in new prevalent HRD structures."

(Poell, 2012b:527)

The union learning representative can be regarded as a facilitator for situated workplace learning. Union learning representatives do not usually deliver the learning intervention but union learning representatives are crucial in encouraging their colleagues to participate in learning interventions. This identifies a potentially fundamental pre-learning intervention, a support role, and possibly as crucial a post-learning intervention role, in which union

learning representatives encourage colleagues to participate in reflective practice, and to identify and take ownership of the impact of their participating in a learning intervention. This would be particularly valuable in workplace environments where the evaluation of learning, and the impact of the transfer of learning back into the workplace, is absent. This is with reference to Kirkpatrick's (1967) model of evaluation, cited in Bee and Bee (2000:176), which proposes evaluating learning at four levels of:

- 1 Reaction level: measures what the delegates think or feel about the training
- 2 Immediate level: measures what the delegates learned from the course
- 3 Intermediate level: measures the effect of the training [learning] on job performance
- 4 Ultimate level: measures the effect on organisational performance

(Adapted from Bee and Bee, 2000:176)

The evaluation stage of the learning and development process is often less than effective in UK workplaces. Evaluation activities and outcomes are specified in the third principle of the liP standard: 'Plan, Do and Review' (liP UK, 2009). Evidence from Coopers and Lybrand's 1984 work that found no evidence of evaluation activity through to CIPD's 2010 annual survey of Learning and Talent Development Activity confirms this and a sample of that evidence is presented below:

Reference:	Evidence of evaluation activity
CIPD (2006:27-30)	91% of respondents reported that they do evaluate training 98% use Kirkpatrick level 1 evaluation exercises 75% use level 2 exercises 62% report evaluation activity meeting level 3 criteria 36% go as far as level 4 18% look at the full return on their investment in learning and training More complex evaluation activities tended to be applied to less than 10% of training events

“... the evaluation of talent practices has long been a tricky area for HR practitioners and it is clear that organisations are still struggling with this. However, with organisations coming under relentless economic and budgetary pressure, there is an even greater need to ensure that talent strategies are aligned to business critical needs, are considered effective, delivering dividends, and that organisations have some clear metrics to provide evidence of this. While talent strategies once enjoyed the almost unquestioning favour of CEOs, now they need to unequivocally prove their worth [...]”

(CIPD, 2010:31)

It is acknowledged here that it is unlikely that the majority of union learning representatives would be working with colleagues participating in talent development interventions but the lack of monitoring and evaluation of such elite, workplace learning activity suggests that the level of monitoring and evaluation of, for example, basic skills workplace learning activity could be considerably less. The paucity of monitoring and evaluation activity compared with the fundamental necessity of it in the ongoing attempts to encourage employers to support and resource training, development and learning activity for their workforce suggests there is the opportunity to investigate the contribution union learning representatives could make to the evaluation process at levels 2 and 3 of the Kirkpatrick model.

Evans et al. (2006) suggest that, in respect of the context of learning, social institutions influence the immediate context of the organisation, contributing to a learning environment that can be characterised on the expansive-restrictive continuum in the workplace itself. They cite Whitley (2000:88):

“... contrasting ways of structuring tasks and jobs, of controlling how work is allocated, performed and rewarded, and of structuring employment relationships [...] these systems are linked to the nature of firms, interest groups, and dominant governance principles or ‘rules of the game’ in different societies, which in turn stem from different patterns of industrialisation.”

(Evans et al., 2006:166)

The work of Westwood, cited in Warhurst et al. (2004:53), refers to the Learning Pool (and MORI) (2002), that showed that British workers have a desire for learning. Their findings were that 23% said training was the most important factor when looking for a new job and 31% said they would do their job better with more training, and interestingly almost all of these respondents felt that they were good at picking up new skills. Finally, 44% said they trained in order to enjoy their jobs more. According to Evans et al. (2006), workers can sometimes make a difference for themselves and their colleagues. They acknowledge that those with higher status positions and greater access to power are more able to do this. Applying this to the union learning representative situation, union learning representatives are likely to be at the same status position as their colleagues. The only access to greater power would be due to recognition of their union learning representative role. Evans et al. (ibid) reaffirm that employment conditions are an important influence on the learning environment itself. Such influences are identified as: workload, job satisfaction, hours of work, job security, promotion prospects, interesting challenges, supportive colleagues, trade union support and good management; all these will influence workers' dispositions to learn as well as the opportunities themselves. Expansive measures to support learning must also increase the individuals' ability to take advantage of these opportunities in practice. Workers' disposition to learn will vary, from individuals where work is an important part of their identity through to others where family, leisure and/or other outside activities may be more important. An individual's disposition to learn is also related to gender, ethnicity, social class and age. Effective improvement of the learning environment should, where possible, take account of these dispositions and be flexible in scope and accepting of a range of reactions. An example is given of where some workers perceived that paid educational leave drew attention to their weaknesses in a very public way. In contrast, they cite Hodkinson and Hodkinson (2000) who found that in the teaching profession learning could be improved by taking teachers out of their classroom to work with colleagues in other departments and schools. Yet school managers and the teachers themselves wanted to maximise the time spent in their classroom for the benefit of pupils being taught.

Is it appropriate for PSHs to have the choice of participation or not in the union learning representative initiative merely based on their expectations of what the union learning representative initiative can do for them? Evans et al. (2006) make reference to the statutory rights for union learning representatives established by the 2002 Employment

Act. According to Evans et al. (ibid, this had the potential to encourage trade unions to make training, development and rights to learning more central to union concerns either via collective bargaining or through partnership approaches with the employer. They feel the involvement of trade unions may make learning more appealing to some members who have had little access to it in the past. They go on to identify what they see as a number of weaknesses in the legislation: firstly, there are no requirements on the employer to cooperate with trade unions on training over and above the provision of leave for union learning representative activities; secondly, if the legislation aimed to raise workers' demand for learning, it does not provide employees with an entitlement to paid educational leave; and, finally, employers have no responsibility to work jointly with their representatives to enhance workplace learning.

Employers constructing a more expansive learning environment, Evans et al. (ibid) argue, is more likely in times of prosperity than contraction, but they add that it is not only prosperity that supports the creation of a learning environment: major investment and the introduction of new forms of work organisation have been known to be introduced at times of crisis. They propose it is at these times of crisis that employers may be prepared to consider innovative approaches to learning, including joint approaches with employee representatives, due to the scale of change requiring a high level of trust to reassure employees that jobs are not threatened. They go on however to offer four conditions that are likely to encourage organisational learning interventions:

“

1. *Interventions need to address both employee and employer needs. Otherwise it is possible to reduce the opportunities for learning and the effectiveness of learning by making the learning environment more restrictive.*
2. *The involvement of employee representatives contributes to the expression of employees' interests and can reassure them that gains in productivity will not have a negative impact on jobs and conditions of employment.*
3. *Learning needs to be seen as an integral part of practice rather than a bolt-on activity. Interventions need to address the learning environments as a*

whole – for example, how both the work environment and formal learning can be made more expansive.

4. *A short-term time frame and a narrow view of learning, dominated by measurable changes in performance, will not enhance the learning environment and can stifle innovation.”*

(Evans et al., 2006:168)

Grugulis (2007) states that employees, firms, sectors, and government make choices that can increase or decrease workplace skills. The skills and knowledge an individual possesses have an influence that extends beyond the economic fortune of the company employing them. Health, life expectancy, and earning might all depend on the individual's education and skill levels. Grugulis (ibid) suggests this is too important an issue to leave to individual firms or workers in the hope that whatever decision is economically rational for them at the time will also benefit society as a whole:

“It would be nice to believe that, in future, such choices will seek to improve working lives, to support citizenship and to pursue social justice as well as to protect profits.”

(Grugulis, ibid:18)

Thus, from the evidence discussed in this chapter, it is possible to apply the chain of corporate governance (Johnson and Scholes, 1997:186) (Figure 1 in Chapter Two) and the power/interest matrix Johnson and Scholes, ibid:198) (Figure 2 in Chapter Two) to the actors identified in workplace learning. In summary, Rainbird (2000a) suggests mutual interest in workplace learning from employers and employees. Rainbird et al. (2004) refer to the power relations in workplace learning, and Harrison (2009) suggests that employees often cannot be given the time they need to be in control of when and how such learning interventions occur. Evans et al. (2006) and Grugulis (2007) identify the stakeholders in workplace learning as government, employers, and employees. They suggest that employers' and employees' actual participation in workplace learning lags behind the espoused levels of support for such activity. In fact, they suggest that employers and employees choose not to engage in it. Westwood (2004) identifies the negative attitude of employers to workplace learning. This confirms the placing of employers at the local level in quadrant C and the employees at local level in quadrant A of the power/interest matrix,

(adapted from Johnson and Scholes, 1997:98. See Figure 2, Chapter Two.) It also confirms that the PSHs in the 'green for go' elements of the chain of corporate governance model, adapted from Johnson and Scholes, *ibid*:186 (see Figure 1, Chapter Two), are the national level representatives of PSHs and make their decisions at considerable distance in the chain from the local level PSHs, in the red section, whose buy-in to workplace learning activities can either result in 'green for go' or 'red for stop' responses to what the national (green) and/or regional (amber) representatives for the PSHs may desire.

Conclusion

This investigation into the context of workplace learning suggests that often the workplace does not readily support and facilitate learning interventions. Having identified some of the barriers to workplace learning, various commentators offer strategies that might better facilitate workplace learning. The literature suggests a reluctance by key PSHs to offer the levels of learning and development opportunities required to ensure the workforce of the UK has the knowledge, skills and attitudes required to meet the demands of the twenty-first century. The evidence also demonstrates employers' reluctance to facilitate workplace learning for some members of the workforce. It would appear that many employers' interests and attitudes stymie schemes such as the union learning representative initiative and its opportunity to encourage a change in attitude and response to skill shortages in the workplace and the facilitation of workplace learning. The evidence presented has met the objectives set for the chapter and has:

1. Identified the context of workplace learning
2. Identified some of the realities of workplace learning
3. Identified what barriers and/or enhancers exist in relation to the practice of workplace learning
4. Identified strategies that could support workplace learning

The methodology (Chapter Six) explains that this research gathers evidence to show the extent to which union learning representative activity has met the expectations of its PSHs; in the light of the realities identified in this chapter, this investigation appears particularly relevant.

Chapter 4: Unions and Learning

This chapter conceptualises the relationship between unions and learning. This relationship is more fully understood by an appreciation of trade union involvement in education and learning within the UK. In the light of this historical context union and employer partnership is explored. In order to achieve this, the following objectives have been set:

1. To acknowledge trade unions' involvement in education and learning in the UK.
2. To identify examples of union and employer partnership in promoting workplace learning.
3. To review literature specific to the union learning representative initiative.
4. To identify examples of the impact of the chain of corporate governance and stakeholder mapping via the power/interest matrix (adapted from Johnson and Scholes, 1997, as discussed in Chapter Two) within the sphere of unions and learning

Stakeholder Mapping: the power/interest matrix (Adapted from Johnson and Scholes, 1997:198)			
		Level of Interest	
		Low	High
Level of Power	Low	A	B
	High	C	D

The above unpopulated version of the power/interest matrix is provided as a key for the definition of quadrants throughout this chapter. Within the text occupancy by a PSH will be referred to as quadrant A: B: C or D where:

- A = low power/low interest
- B = low power/high interest
- C = high power/low interest
- D = high power/high interest

Recent History

Calveley, in Shelley and Calveley (2007), provides a historical overview of union involvement in workplace learning and training, dating back to the late 1880s. As she states, 'educate, agitate, organise' has long been a battle-cry of trade unionists. In the early days of the organised labour movement, education for people from the working class was rare, and trade union leaders saw education as a means of enlightening workers about capitalist oppression and social inequality. Calveley reports that even then it was a group of 'new' unionists who pioneered the vision for a more widely educated workforce, via the 'eight-hour movement'. Their call was for an eight-hour working day that would facilitate:

"... leisure to think, to learn, to acquire knowledge, to enjoy, to develop; in short, 'leisure to live'."

(Shelley and Calveley, 2007:15)

They were heavily critical of the 'old unionists' who, they argued, were so focussed on protecting wages from falling that they ignored the wider social responsibilities of their role. The Trade Union Congress (TUC) became involved at the turn of the twentieth century and saw education as a way of improving access to higher skilled, and therefore better paid, work for the workforce. This involvement in education by trade unionists was resisted and resented by many employers.

The Workers Educational Association (WEA) was founded in 1903 and, according to Calveley, has played a prominent role in the post-compulsory education of working class people ever since. Its aim was not to educate people out of their class but to educate them so that they would be able to influence other working-class people. The Workers' Education Trade Union Committee (WETUC) was founded in 1919 with the aim to strengthen and support the WEA's work with trade unions. This provided education for trade union members, who were encouraged to attend educational activities. These activities were often partly or fully funded by the union. Calveley continues that, at the time of writing (2007), the WEA claimed to be the UK's largest voluntary provider of adult education. The close connections between the WEA, trade unions and the TUC continue. At the time of writing this thesis (2013), the WEA North-West Region of England state that since 1903

[and to date], their charitable aim has been to see that no adult is denied access to education on the basis of social, economic or personal disadvantage (WEA, 2013).

Late-Twentieth- Century Observations

According to Streeck, trade unions and social democratic parties in the early 20th century attached great significance to learning, challenging the upper and middle classes belief that the masses were unable to be educated (Streeck, 1989). Furthermore, in the post-war era employers did all they could to eliminate skills from the shop-floor under a Taylorist work regime, and it was often the unions, who, mostly in vain, resisted the 'degradation of labour'. He continues that, during the boom years, unions made their peace with Taylorism, as terms and conditions of employment improved, and working against the elitist minority of traditional craft workers could be viewed as promoting equality. At the end of the 1980s, however, employers were beginning to regret their former policy of de-skilling. A rebuilding of the skill base of Western economies appeared to be the most promising means of defending and extending whatever degree of equality unions had been able to achieve in the past. There was a need to revitalise the traditional commitment of the left to knowledge and skills.

According to Streeck (ibid.), as the European high-wage economy came under greater pressure from Asian competition, training was discovered as a potential means of raising work skills to the level where they justified the high and relatively uniform price of labour imposed on European economies by collective bargaining and the welfare state. Streeck further argued that, if a widespread equal distribution of skills was becoming a prerequisite for economic success, then egalitarian interests on the part of trade unions may not only be compatible with the interests of capital but their forceful communication of this need might be a pre-condition of such interests being realised. Evidence of progress to date (discussed later in this chapter) suggests this was an optimistic vision.

“Democratic corporatism may have a future after all and in particular in an area like training where it seems that both trade unions and employers may, for partly different and partly identical reasons, be about to discover a joint interest in jointly preventing market as well as state failure.”

(Streeck, 1989:103)

Other commentators in the mid-1990s including Costine and Garavan (1995), acknowledged that trade unions have long recognised the benefits of providing education and training for officials and activists. Such activities were seen as a vital element of the effectiveness of trade unions maintaining and improving services to members as well as their own organisational and administrative capabilities. This was in contrast to their established attitudes towards the training and development of members as employees, which had traditionally registered low on the priority scale of trade unions. Costine and Garavan report that in the mid-'90s, there were indications this previously-held position was undergoing considerable change. Nevertheless, they suggest the overriding priorities of trade unions were still to do with maintaining or improving terms and conditions of employment. They claim training and development was of little concern to the general trade unions, which largely represented the unskilled and less skilled proportion of trade union membership. The craft-based unions, however, nurtured the apprenticeship system and were often gatekeepers to the craft occupations. Costine and Garavan report that these unions had sectional interests and maintained control on the numbers entering specific crafts. In summary, the nature and extent of training and development received or not by members as employees has not, in traditional terms, been the subject of trade union intervention. More recent times had seen an evolving focus on issues concerned with the training and retraining of members. This more interventionist approach was seen to be linked to developments in work organisation and workforce management via strategically oriented initiatives, such as total quality management (TQM), world class manufacturing (WCM) and human resource management (HRM). These initiatives required increased workforce flexibility and the adoption of new technology by the workforce. Costine and Garavan report that, as regards the training available for members:

“... the trade union position on training and development was seen to have moved from a passive and non-interventionist stance to one which was largely interventionist in defensive terms.”

(Costine and Garavan, 1995:40)

They ask whether or not it is appropriate for trade unions to become active stakeholders in the training and development process; and conclude that it is. Costine and Garavan justify this view by making links between trade unions' involvement in training and their attempts

to; attain job security for members, respond to members' expectations, and provide them with opportunities, for job mobility both internally and externally to their workplace. So, they argue, the relationship between learning and participation in union activity is relevant from two trade union perspectives: firstly from an organising perspective and the need to encourage high levels of membership involvement in work organisation and policy development at the workplace level; and secondly:

"... to provide education, for participation is itself a political statement in favour of a participatory rather than a hierarchical society, but not to provide it cannot be considered a position of neutrality."

(Hampton, 1980, cited in Costine and Garavan, *ibid*:41)

Thus, involvement in education might be viewed as an act of self-interest on the part of the union movement, but a trade union would hardly be representing its members' interests if it did not offer opportunities that could benefit individuals as members of society and not just as union members. Costine and Garavan suggest that this intervention by the trade unions might manifest itself in work organisations via the adoption of principles to guide the application of training and development in the workplace, establishing training committees, and the negotiation of training agreements; plus they felt it would seem reasonable to pursue the embodiment of these within a legislative framework. Costine and Garavan confirm that, while their research was focused on Irish trade unions, a strong comparison was drawn to similar developments and shifts in attitude occurring concurrently within the UK. They also acknowledge that the position taken by management represents a critical part of such developments, as regards the extent to which the established management prerogative on training and development might be relinquished willingly. They conclude:

"However, if the prospect of involved, empowered, skilled and flexible employees appeals in equal measure to both employers and trade unions, as it surely should, common agreement in the importance of training and development must also merit serious consideration."

(Costine and Garavan, *ibid*:43)

Suggesting that occupation of a high interest quadrant D or B of the power/interest matrix (Johnson and Scholes, 1997:198) by both sides of the employment relationship would be preferable.

UK Employee Development Schemes

At this point, it is appropriate to consider union involvement in what were referred to as Employee Development (ED) Schemes. These were aimed at encouraging employees to engage with learning, and took place during the late 1980s and into the early 1990s. Thursfield and Hamblett (2001) investigated employee-led development (ELD) via two case studies. ELD schemes were imported to the UK from the US in 1989 in the form of Ford Motor Company's Employee Development and Assistance Programme (EDAP). Reports such as the Fryer Report (Fryer, 1997) gave status and credibility to ELD schemes as a means of improving employee skills (Thursfield and Hamblett, 2001). Accordingly ELD schemes were seen as an important element in the government's attempts to promote learning at work. Thursfield and Hamblett cite the work of Forrester, Payne and Ward (1995), who explain the nature of ELD schemes. ELD might have encompassed job-related learning but the major focus was on personal development and an employee centred approach. They cite the characteristics of the DfEE's 1995 definition of ELD which confirms that participation was voluntary, with the learner choosing what and how to learn. They offered continuous learning opportunities and involved employees and/or trade unions in the start-up and administration of the scheme. Learning was to take place in the employees' time rather than the employers'. The learning was to be additional to job-related training and the learning was financed by the employer. They report that, in the early years, there was a notion that ELD could defuse the tensions between capital and labour but that this was not borne out in practice.

Thursfield and Hamblett (ibid.) found that, in cases where the organisation was trying to achieve a culture change, then the aim of the ELD scheme was not just to improve skills but also to manipulate the attitudes of highly skilled workers. They also found that there was a distinction in employees' minds between knowledge for personal benefit and work-related knowledge. The employer could not understand why some employees did not want to participate in the offer of IT training. Concluding that:

“For those employees whose jobs remain rooted in the Fordist paradigm, ELD has little impact on work-related skills.”

(Thursfield and Hamblett, *ibid*:341)

Thus it would appear that employees, with a choice to participate or not, occupied quadrant C of the power interest matrix.

Employees sought improved terms and conditions and increased job security but ELD could not deliver on these. They found that all of the participants reported that they had benefited on a personal level but in respect of creating a more unitarist approach to the employment relationship, ELDs could not overcome existing tensions and conflict within the employment relationship:

“The vision of a new partnership between stakeholders, to deal with an uncertain and changeable economic climate, is lost in the mire of existing workplace conflict.”

(Thursfield and Hamblett, *ibid*:350)

This is further evidence that the nature of the employment relationship has a profound impact on ED activity, either when it is led by union learning representative activity or when it comes in the form of employer-led schemes to encourage employees to embrace learning.

Two examples of UK-based ED schemes were the aforementioned Ford Employee Development Assistance Programme (EDAP) scheme and the Rover Learning Business (RLB). The Ford EDAP scheme was established in 1987, during contract negotiations with hourly and salaried employees (Ford, 1987). The following aims were agreed:

“To enhance the personal development and well-being of all employees.

To provide personal educational and training opportunities.

To provide resources to encourage a healthier lifestyle.”

(Wilson, 2005:152)

Payne, in Raggatt et al. (1996), states that the success of the Ford EDAP scheme encouraged other large manufacturing firms, such as Lucas, Rover and Peugeot, to develop ED schemes,

but with the caveat that it was not an effective model for all employers. He cites the work of Forrester et al. (1993):

“... at the end of 1989, 95% of UK businesses employed fewer than 20 people, and accounted for 35% of employment outside central and local government [...] public support was necessary if small and medium-sized (SME) employers were to be able to emulate the success of larger firms.”

(Payne, 1996, in Raggatt et al., *ibid*:223)

Burnes (1996) provides an overview of the circumstances of the establishment of the RLB. This followed the determination of the then Managing Director, Michael Edwards, to restore managerial authority and end union militancy. Burnes (1996) reports that the Rover Learning Business was created in 1990 to accelerate the pace of change at Rover and to give focus to the company's various learning initiatives.

Holden and Hamblett's (1998) work refers to ED initiatives, such as Ford's EDAP and Rover's RLB, that offer employees the opportunity to participate in non-work-related learning of their choice. They refer to the nature of them as an orthodox account of ED. The orthodoxy is represented by a model of what they refer to as 'the virtuous circle' (Holden and Hamblett, *ibid*:243). The start of Holden and Hamblett's virtuous circle is an ED scheme that facilitates the return to learning by the workforce, where the workforce discover the power of learning, which in turn creates a commitment to continuous learning within the individual. This awareness presents in the workplace as increased contribution, commitment and loyalty from the workforce, and presents in employees' as greater flexibility, a propensity to change, and a positive attitude to change. This suggests that employees occupy quadrant B. The outcome of this, for companies and for employees, is efficiency and effectiveness in their day-to-day activities, thus resulting in competitive advantage for companies in the UK. This orthodox account promotes ED on the basis that such initiatives contribute to organisational effectiveness and competitiveness by promoting learning and flexibility. They argue that there are two flaws to this idea: the underdevelopment of these central concepts of potential outcomes, and the management of ED. They suggest support for such initiatives is an ethical imperative; and that, in a democratic society, the workplace should be regulated in a democratic fashion; and they

conclude that ED deserves to be sponsored as it contributes to the democratisation process.

Whilst the achievement of the Ford EDAP scheme is presented as the model for such ED initiatives, the growth in such schemes was stimulated by the Training and Enterprise Councils (TECs), and a number of those that followed did not follow the principle of joint regulation by management and trade unions. Holden and Hamblett (ibid) cite Metcalf (1992), whose research showed that there had been a growth in schemes regulated by management alone. These ED initiatives were run with TEC support and to a TEC model. They report that the TEC model was meant to replicate Ford's EDAP scheme. The fact that the Ford EDAP scheme was jointly regulated by management and the trade unions helped overcome scepticism amongst the Ford workforce that ED was a 'management trick'. Application of the corporate chain of governance (Johnson and Scholes, 1997:186) to this scenario identifies this is an example of control of an initiative by national and regional level PSHs with the responsibility for implementation by local level PSHs. The TEC-supported ED initiatives, however, did not exclusively practise joint regulation; it was very often a management initiative, run by management with the support of the trade unions. They conclude that the result of this is that ED is Janus-faced:

"... when introduced by an employer committed to a broader programme of [...] democratic change, ED represents a powerful ideological aid, [...] when introduced haphazardly, as part of a more or less intentional attempt to exert downward pressure on terms and conditions of employment within a 'low-trust' environment, the ideological power of ED is not diminished, rather, it serves the cause of employee opposition."

(Holden and Hamblett, ibid:249)

This suggests that it can be perceived as a 'management trick' and employees naturally are opposed to participating or participate under duress, limiting the value-added benefits suggested as possible outcomes from such ED schemes via the virtuous circle.

According to Hamblett and Holden (1999), the DfEE reported that the number of ED schemes was 50 in 1993 rising to 450 by the end of 1995. Evidence from their research identified participation rates in ED schemes of up to 15% of the workforce but also below

ten per cent in some cases in the first year. They report evidence from the Ford EDAP scheme that participation rose over time, further suggesting that this was due to employees experiencing the mutuality of the scheme first hand and that, therefore, employee trust in the scheme started to replace initial scepticism. They summarise that the notion of mutuality in such schemes is underdeveloped and consistently contrasts with employees' experience of the reality of how such schemes are regulated. The fact that most employees elect not to engage, despite the constant reference to participation being in common interest, perplexes the ED evangelists. Hence providing evidence that employees shift their occupancy from quadrant B to quadrant C when they perceive a hidden management agenda.

From the work of Hamblett and Holden (*ibid*), it appears that employees get tired with 'initiativitous' and 'bolt-on' ideas in the workplace, which are often perceived as 'management tricks'. This occurs particularly in situations where previous experience demonstrated that the checks and balances of the old system are not reviewed to accommodate the impact of new regime. Where employees experience this within a scheme, sold to them as being mutually regulated by the employee representatives and the management, they may be reluctant to embrace such initiatives again.

As part of the European Year of Lifelong Learning (1996), it was reported that unions have historically provided support and resources for employee development and that educational opportunity lies at the heart of the trade union movement's mission. Further, it was claimed that, as modern-day cousins of the medieval guilds, unions are conceptually related to contemporary work-based learning practice (Work Based Learning Bulletin, 1996:7:1). The article goes on to suggest that unions are well practised at getting the message across, and at establishing recognised communication channels between learning providers and the factory floor. Furthermore, it says, the then increasing popularity of HRM principles together with the uncertainties of the post-1945 economic climate and 1980's employment relations legislation had presented the unions with a challenge. The unions had recognised that they had to develop a more pragmatic style of negotiation and they began to adopt a new approach to working with employers, referred to as 'jointism'. This, it is reported, was an early framework for later workplace partnerships, such as the Ford EDAP scheme.

The TUC (1998) cites evidence from the Institute of Public Policy Research (1995) that employees working in unionised workplaces are twice as likely to be trained than people in workplaces where unions are not recognised. In addition, Green et al. (1996) found a positive relationship between unionisation and formal training strategies. This document also cites evidence from the Employment Department (1994) that:

“... management(s) that share decision making over training are the most successful in transforming workplace attitudes to training and change.”

(TUC, *ibid*:5)

It would appear therefore that a more equal power/interest position, by both sides of the employment relationship, is more successful in this regard.

The Union Learning Representative Initiative – National TUC perspective (national level PSH)

The TUC is the key PSH to the union learning representative initiative and as such may have very different ideas about the union learning representative initiative to those of other PSHs, these are explored in this section of the thesis.

In making its case for skills, the TUC (1990:1) stated that:

“Britain faces many challenges in the decade ahead. Major changes in work, in the workforce and in the global economy are placing an ever higher premium on skills. By the year 2000 Britain will have made the choice to be either a super-skill, high pay economy or a low-skill, low pay economy.

Trade unions are committed to the first course... The TUC believes that this skills challenge can only be met on the basis of a statutory framework of rights to training and a major role for Government...

With or without those rights, the massive expansion in skills which we seek will only be achieved if unions and employers work together to ensure that the needs of individual workers and enterprises are met by quality education and training.

The TUC and CBI are engaged in a dialogue about how best to achieve our shared objectives of continuous training for all. A key union role will need to be played at enterprise and workplace level if those goals are to be realised.”

(TUC, *ibid*:1)

This is the starting point for action, where both national level PSHs, occupy quadrant D, the union learning representative initiative would eventually emerge. It would appear that the TUC view themselves and employers as PSHs occupying quadrant D of the power/interest matrix (Johnson and Scholes 1997:198). As regards the chain of corporate governance (Johnson and Scholes *ibid*:186), at national level it presents the TUC and CBI as ‘green to go’ with a perceived ‘green to go’ role for individual unions at regional and local level. This ‘line in the sand’ was presented by the TUC in 1990, citing a further stakeholder, the CBI (employers), and calling for support from the Conservative administration. The term ‘union learning representative’ does not appear at this stage but it does state that:

“... the activity of workplace representatives will be vital in taking up individual concerns.”

(TUC, *ibid*:2)

The TUC presented a call to action in response to their involvement in the CBI-led initiative (Fennell, 1992) that identified the first set of National Education and Training Targets (NETTs) (TUC, 1992:2). In the introduction to the TUC guide, the then TUC General Secretary, Norman Willis, stated that trade unions can do much to exert influence on employers to set targets at enterprise level. He goes on to say that trade unions’ own target must be to put training and employee development to the top of the negotiating agenda in all unionised workplaces. He also said unions had a big role to play in promoting a positive approach to the training and development needs of the workforce. This suggests employers occupy quadrant C of the power/interest matrix at enterprise level with occupation of quadrant D by unions and their representatives at national, regional and local level. The TUC stated it believed the future of the country was dependant on raising the skills of the workforce and giving them a greater say in their work. This required joint ownership of the NETTs and joint action to deliver them, as well as:

“... a call for all unions to bargain for skills.” (TUC, *ibid*:13)

Here the rhetoric of national level PSHs appears to be at odds with the reality for PSHs at the local level.

TUC and Training and Enterprise Councils – Partnership?

The scene setting for the introduction of this PSH (the TECs) commences with an overview of the 1994 launch of the TUC and TECs' Bargaining for Skills (BfS) projects. The timeline for implementation was as follows. In 1994 the TUC and TECs launched the TEC-established Bargaining for Skills (BfS) projects. Clough (2007:8) (TUC Senior Education and Training Adviser) describes these as being the most significant partnerships between TECs and the union movement. This suggests that both partners occupy quadrant D in this symbiotic relationship. TECs established the projects because they could help meet some of the TECs' targets in contracts with the government. The scope of the projects were by their very nature limited to the TEC agenda (Clough, *ibid*:8), with union Project Workers trying to use the projects to promote the wider trade union agenda of lifelong learning. From a national TUC perspective, it appeared that union Project Workers at local level were in quadrant B of the power/interest matrix and were operating at 'green' activity level in the chain of corporate governance.

According to the TUC, the TECs did not have close links with the local community. The reality of appointment to sit on a TEC board had been found to be on a 'grace and favour' basis, with only token representation of trade unions, education interests and voluntary bodies. The TUC occupying quadrant B and the TECs occupying quadrant C in such situations. The TUC called for reforms to the composition and remit of TECs, although it was acknowledged that the TUC and some individual unions had been working with certain TECs to increase demand for skills and to help meet the TECs' training targets, evidence that some TECs were operating in quadrant D and at 'green to.

From an interview with The TUC's Senior Education and Training Advisor, Wustemann (1998) reports the TUC's perspective of working with the TECs in implementing the Bargaining for Skills (BfS) initiative. The aim of BfS was to raise trade unionists' awareness of training available in the workplace and to give them the knowledge to negotiate better training with employers. The TECs hoped that trade union input would raise the number of companies gaining Investors in People (IIP) accreditation and create more demand for the

TECs' services in general. A TUC Senior Education and Training Adviser reported that the union movement was suspicious of TEC activities because TECs were employer dominated, and provided schemes such as 'Employment Training', which unions did not support. In the early 1990s, however, the TUC and individual affiliated unions decided there would be more opportunities to serve their membership if they were 'in the tent'. Subsequently the then Transport and General Workers Union (TGWU) and Union of Shop, Distributive and Allied Workers (USDAW) had representatives serving as TEC directors. In this situation, trade unions were working side by side with representatives of a Conservative administration and operating in quadrant D of the power/interest matrix.

Bargaining for Skills in the North West of England – regional perspective

Dundon and Eva's (1998) paper presents an investigation into the state of play of unions' buy-in to the TUC's Bargaining for Skills agenda in the North-West region of England. This is significant as it is a precursor to the primary data for the research project that is the subject for this thesis, since the latter revisits the situation in the North-West region of England from 2004 to 2006 and 2008. The aim of Dundon and Eva's (ibid) paper was to assess the role of trade unions at workplace level and the extent to which local representatives were able to engage management within the Bargaining for Skills (BfS) agenda. The key findings were that, where employers had a desire to provide training, then the trade unions were more than capable to act as both a catalyst and conduit for employee demand. In workplaces where there was a distinctive adversarial climate, then better informed union stewards were found to be pragmatic partners who sought to challenge the managerial prerogative over training issues. They felt their findings added legitimacy to the claim for a statutory framework to replace the voluntarist, employer-led system for vocational education and training (VET), and they proposed introducing 'enabling' legislation similar to the principles of the Health and Safety at Work Act (1974), which define employers' duty and employees' attainable rights.

The key findings from their 1992-1993 pilot survey of full-time officers (FTOs) and shop stewards found that the BfS that took place tended to be ad hoc, and arose out of other events, such as the introduction of new technology; it was not, therefore, training being offered for its own sake. From the FTO perspective, the depth of bargaining on VET tended to be at local, company level rather than industry or sector level. When stewards were

asked if training was a high or low priority issue in their organisation, 53% viewed training as a low priority. Dundon and Eva (ibid) comment that the initial pilot survey revealed that, despite national level union rhetoric at the time for joint action on training, the actual experience at local level was somewhat different. There was little evidence that even formal agreements for ED had an impact or, in some cases, were even practised. This evidence places the TUC and union representatives occupying quadrant B and the employers in quadrant C.

Their second investigation was an evaluation of the impact of a TEC-supported project to brief FTOs and shop stewards on VET developments and encourage them to raise training within the context of workplace bargaining. The findings from this were that, whilst stewards were adopting positive attitudes towards VET, few employers were either able or willing to make significant financial investment. It was found that stewards who were participating in the trade union education process themselves, which by this time raised awareness of the Bargaining for Skills agenda, were better equipped and increasingly self-confident when approaching management over training issues. Union representatives were also promoting a skills agenda by combining both co-operative and adversarial bargaining approaches. Furthermore, stewards adopted a supportive (yet cynical) role towards Investors in People (IIP), as IIP development allowed them a greater consultative, if not direct, bargaining role. At this point it was hoped by the authors that the prevailing political and ideological climate, after the May 1997 general election, would increase the role and influence of trade unions, towards a new bargaining agenda of skill formation. Thus they suggested that, in respect of ED, specifically informed union representatives are better able to bargain. The TUC North-West Region's (1997) Year Two Report on BfS states that one of the most productive aspects of the TUC's work on training was the practical projects it was running with TECs, BfS being the most prominent. In the same report, John Monks (TUC General Secretary) states:

"... If Britain is to have a world-class workforce, then every workplace must become a learning organisation and every worker a learner ..."

(Monks, cited in The TUC North-West, 1997:1)

"... and every trade unionist a mentor." (Work Based Learning Bulletin, 7, 1996:1)

This suggests the TUC would be operating in quadrant D and at 'green to go', not only at national level but also at regional and local level via its lay representatives within enterprises. For this vision to become a reality, all PSHs driving the initiative would have to be occupying quadrant D and those on the delivery side of it occupying at least quadrant B. The report states that the projects were making a significant impact on local strategies for training and had been praised by both unions and businesses. The region's TECs had welcomed the projects for creating a direct demand for training from employees. The TUC had signed a national accord with the TEC National Council to develop and promote the projects. Following the election of the Labour government in May 1997, TECs used BfS projects to promote and deliver the new government initiatives.

Bargaining for Skills developed further, with aspirations to become something of a national ED scheme, across multiple workplaces. The orthodox view (Hamblett and Holden, 1999) remained an assumption of mutuality, common interests, and a somewhat unitarist expectation of the outcomes from investing and participating in BfS, which was funded by the TECs in the early days and then by the incoming LSCs that replaced them. It is worth noting, however, who is in the driving seat from the funder's perspective this time around: this time it is the other side of the employment relationship, the TUC and its affiliate unions who are bringing the funding into training. And it is they who are seeking buy-in from the employers for this union-led ED scheme, seeking a mutually regulated approach to its implementation and practice in the UK. Perhaps it is not so much a case of 'the Emperor's new clothes' as ideology re-assignment. Once again this provides evidence that the nature of the employment relationship is crucial to facilitating such activity. The unions might have gained some power with having access to funding but the power to facilitate such activity is still with the employers, often occupying quadrant C.

Post May 1997

The Labour Administration came into office in May 1997. This was a major shift for the initiative as regards a high power/high interest PSH at national level, that had funded Bargaining for Skills. A task group was established to look at unions and the provision of lifelong learning. The group was to be chaired by the RMT's General Secretary. The group was to examine the provision of learning services by the TUC and its affiliates, and to find out how the union movement could support the recently elected Labour government's

plans for, for example, the University for Industry and Individual Learning Accounts. The TUC spokesperson suggested that, if enough lay representatives were trained to a high enough level in identifying the learning opportunities available in industry and how they are best delivered, some employers may come to rely on them as 'experts' within the workplace in the same way as they did for health and safety. The TUC's Senior Education and Training Advisor did acknowledge that, at that time, there was some way to go (Wustemann, 1998:10).

"The TUC Learning Services Task Group's remit was to make proposals for strengthening union involvement in lifelong learning and skills training."

(TUC, 1998: front cover)

The TUC (ibid.) reported that, at a special meeting of the General Council of the TUC in October 1997, members considered key areas in which the TUC and unions could add value to the opportunities for members, and a new TUC Learning Services Task Group (TUC LSTG) was set up with the following remit:

"Remit:

To develop practical proposals for implementation which are designed to provide a high profile for the TUC and trade unions as providers and/or facilitators of vocational and other learning opportunities for members and potential members."

(TUC, 1998:5)

The TUC LSTG (TUC, ibid:4) acknowledged that unions have a unique relationship with their members and people that the education service has not been able to. Unions can explain the benefits of workplace and lifelong learning to members and help members raise and achieve their aspirations. Union representatives can play key roles in:

"Promoting, negotiating, planning, supporting, delivering and monitoring lifelong learning for their members."

(TUC, ibid:4)

As discussed above, this tradition of union education was recognised as crucial for the implementation of a key strategy presented in the 1998 TUC LSTG report. This is, of course, fundamental to this piece of research, in that:

“In developing such union capacity, we need to create a union ‘learning’ representative. Just as health and safety representatives have helped create safer workplaces, union ‘learning’ representatives could help create learning workplaces. That is what our union learning services proposals aim to do.”

(TUC, *ibid*:5)

Thus, the idea for the union learning representative initiative was born, demonstrating expectations that union learning representatives would occupy quadrant D with their employers. The 1998 TUC Annual Conference supported the call for Union Learning Representatives (Reid, Barrington and Brown, 2004:30) and it is reported in an account of union learning landmarks (TUC, 2004:3) that the first union learning representatives were trained and accredited in the year 2000. A further role was to raise members’ awareness of the benefits of learning and help them to access provision; this showed expectations that employees would rise from quadrant A to quadrant B. Although surprising, there was a genuine belief at the time that a group of voluntary, lay representatives, employed by the employer, could make such progress in an area that decades of national policy and some legislation had not managed to influence on a sustained basis.

The Learning Age Green Paper (DfEE, 1998) established the Union Learning Fund, declaring that:

“The Union Learning Fund (ULF) was established in 1998 to promote activity by trade unions in support of the objective of creating a learning society. Its primary aim is to develop the capacity of trade unions and Union Learning Representatives (ULRs) to work with employers, employees and learning providers to encourage greater take-up of learning in the workplace.”

(The Union Learning Fund Prospectus, accessed 28th January 2013)

The ULF was held and managed by the TECs and then by the LSCs from 2001. Since May 2006, the ULF has been awarded to and managed by unionlearn with the TUC. The funding

agency under the current coalition administration is the Department for Business, Innovation and Skills (BIS). Unionlearn occupy quadrant B in their relationship with BIS.

In its November 1998 report, the TUC Learning Services Task Group (TUC LSTG) commented that at last there was a real political will to create a learning society with recognition expressed at the highest level via the government's Green Paper 'The Learning Age' (DfEE, *ibid*). The report goes on to identify the shared commitment required from unions and all other stakeholders:

- From the employer, an investment not just in job-specific requirements but also in employees' personal development needs
- From employees, taking more responsibility and ownership of their own learning throughout their working life
- From the government, the provision of lifetime entitlements and support for employees
- And last but not least, from trade unions, the promotion and delivery of quality lifelong learning opportunities to their members.

(TUC, 1998)

This would suggest trade unions and employers occupying quadrant D, employees occupying quadrant B and all of them operating at 'green for go'.

The TUC also identified that supporting workplace learning would have the potential to 'add value' to the union card. They claimed the union membership card had to become an 'access card' (TUC, *ibid*:5) to learning. The report goes on to suggest that lifelong learning for union members and their families could become an important service from unions, recruiting more members, especially young people, early in their careers. It is claimed that workers in unionised workplaces are ten per cent more likely to be offered training and participate in it. Unions, they claimed, could increase demand for learning by putting pressure on employers to invest in training. This assumes a high power position for the unions. It was claimed that the very presence of unions was able to open up channels of communication between management and union representatives to embed effective shared learning strategies. This appears to be a further example of where the rhetoric from

a national level PSH could be at odds with the reality of PSHs at local level, where the activity has to take place.

Further, it was claimed that union representatives could help increase awareness amongst their members of the benefits of learning opportunities and could provide members with basic information, advice and guidance (IAG). There is little acknowledgement of any resistance to their proposals. The discussion develops and considers 'the learning divide' at work and in society as a whole (TUC, *ibid*).

Where:

"the most highly qualified have the most active involvement in learning whilst the least qualified make up most of the non-participants."

(TUC, 2005:4)

On this premise, the discussion now moves forward to the establishment of the Union Learning Fund (ULF) in 1998.

Impact of the Union Learning Fund

Calveley, in Shelley and Calveley (2007:23), argues that, until the establishment of the Union Learning Fund in 1998, trade unions had taken little interest in the vocational education and training of their members, as opposed to the training of their representatives. Furthermore, Calveley cites Rainbird (1990), who argued that, for the labour movement, training ought to be central to a policy promoting the interests of labour. Green et al. (1999), via their quantitative study, analysed British establishment-level data from 1991 and 1993 in order to investigate the links between training provision and workplace unionisation. Their key findings were that both the probability of receiving training and the amount of training received were found to be substantially higher in unionised rather than non-union workplaces, and thus concluded that trade unions can play an important role in developing and boosting skills in the UK. Calveley concludes that, following the election of 'New Labour' in 1997, trade unions were given a positive role in workplace training, and given the Union Learning Fund in 1998 to fund the development of Union Learning Representatives:

“... providing scope for trade unions to influence policy decisions in respect of workplace learning and training and following many years on the sidelines, the TUC and the unions were brought in out of the cold.”

(Forrester and Payne, 2000, cited in Shelley and Calveley, *ibid*:29)

Ashton (in Rainbird et al., 2004) also comments that trade unions had traditionally shown little interest in workplace learning but this was starting to change as the TUC developed TUC Learning Services dedicated to develop workplace learning. Demonstrating a shift in occupancy from quadrant A to at least quadrant B for TUC Learning Services.

The Union Learning Representative Initiative

The TUC LSTG (TUC, 1998:11) proposed developing *a national network of union learning representatives* and supporting them by:

- campaigning for their role;
- setting standards for the role;
- providing high-quality accredited training;
- developing a TUC/union award;
- developing networks for on-going information and support;
- and continuing to build the case for a strong framework of statutory rights.

Thus the union representative is seen as key to any strategy to increase union involvement in learning. The TUC LSTG acknowledged that there were already examples of union representatives who support their members' learning, supported by BfS projects.

They go on to identify the tasks these union 'learning' representatives would fulfil; they were to include the following:

“

- *Generating demand for learning amongst members*
- *Giving advice and information to members about learning*
- *Identifying the learning needs of individual members*
- *Representing members on problems with learning*
- *Negotiating agreements that incorporate learning*

- *Setting up and contributing to joint training or learning committees or forums with a similar remit to safety committees*
- *Working with employers to introduce, implement and monitor initiatives that can have benefits for members, e.g. Modern Apprenticeships, New Deal, Investors in People, NVQs*
- *Arguing for and taking joint ownership of employee development schemes, which may be based on workplace learning centres*
- *Liaising with colleges, TECs and other organisations to secure resources and support for workplace learning.”*

(TUC, *ibid*:10)

Thus the perceived role of the union learning representative was declared. One has to question whether or not this is a realistic expectation of a task that voluntary representatives, of the largest voluntary organisation in Britain, could fulfil. The TUC LSTG acknowledge that their agenda was ambitious and dependant on resources to support it. They felt that both the TUC and unions should target more resources towards learning and that individual unions should produce action plans identifying how their union would put the TUC LSTG agenda into action. This indicates individual trade unions at regional and local level occupying either quadrant C or quadrant D depending on their level of interest but with the power to engage or not.

As discussed in the Chapter Five on NVET policy in this thesis, Reid et al. (2004:41) reported that TECs were replaced by Learning and Skills Councils (LSCs) in 2001. In March 2005 the LSC National Office published the ‘Trades Union Congress and Learning and Skills Council Protocol.’

This document declares a vision:

“The TUC and LSC will work positively and actively together nationally, regionally and locally to help maximise the contribution of each organisation to promote learning and skills and raise demand among young people, adults and employers.

Both the LSC and the TUC recognise the value of the other organisation as a key stakeholder. Each organisation will seek to use its networks to support effectively both the TUC's and the LSC's roles in learning."

(LSC and TUC, 2005)

TUC Learning Services were to provide co-ordination, dissemination, evaluation and quality assurance in relation to union learning activities. The role of the LSC was seen to be planning and funding post-16 learning and skills development. The LSC were to ensure that learning reflected the priority needs that promoted social inclusion and economic development at local, regional, sectoral and national levels. And it was to increase awareness of, and demand for, learning from individuals and employers. The key activities were to be set out in an annual statement of priorities. Previous to this, the 2002 Employment Relations Act had provided statutory recognition for union learning representatives (TUC, 2004:3), clearly placing the then TUC Learning Services at the forefront of the initiative.

According to the TUC (ibid:7), union learning representative activity was having an increasing impact at the workplace. Union learning representatives were helping increasing numbers of members to access learning interventions, thus significantly developing workplace learning cultures and doubling the proportion of colleagues signing up for basic skills courses. This suggests members were moving from quadrant A or quadrant C to quadrant B. The TUC present an outline of the role of the union learning representative (TUC, 2004). This is a revision to that presented above from the TUC LSTG (TUC, 1998). The tasks are not presented in any order of priority. Thus the role of a union learning representative might incorporate any or all of the following:

"Raising employees' awareness of benefits of learning;

Working with employers to identify learning needs;

Negotiating learning agreements with employers including time off for study;

Securing equal opportunities in learning;

Helping employers to establish employee development schemes;

Monitoring quality of provision;

Providing learning advice and guidance to employees;

*Establishing and running trade union learning centres;
Supporting innovative workplace development such as Union Learning Fund
projects;”*
(TUC, *ibid*:7)

It is proposed here that this should be considered a vision for the union learning representative role rather than the reality, particularly if all of the tasks listed are expected to be achieved, by all union learning representatives, regardless of the nature of the employment relationship within their organisation.

A further consideration in respect of expectations of the union learning representative role is that of the duties of union learning representatives as defined in the Acas Code of Practice on time off for trade union duties and activities (Acas, 2003):

“This Code... revises the Acas Code of Practice on Time Off for Trade Union Duties and Activities which came into effect on 5 February 1998. This revised code is issued under section 199 of the Trade Union and Labour Relations (Consolidation) Act 1992 and was laid in draft in both Houses of Parliament on 10 February 2003. The revised Code comes into effect by order of the Secretary of State on 27 April 2003.

Union Learning Representatives

16. Employees who are members of an independent trade union recognised by the employer can take reasonable time off to undertake the duties of a Union Learning Representative, provided that the union has given the employer notice in writing that the employee is a learning representative of the trade union and the training condition is met. (See paragraphs 28 - 33 for further information on the training condition.)

(Acas, 2010:9)

Table 2, overleaf, presents the three sets of union learning representative activity to illustrate common activities and also those that have been excluded between the 1998 and 2004 TUC Learning Services version. Furthermore:

“In practice, the roles and responsibilities of Union Learning Representatives will often vary by union and by workplace but will include one or more of these functions.

17. Many employers have in place well established training and development programmes for their employees. Union Learning Representatives should liaise with their employers to ensure that their respective training activities complement one another and that the scope for duplication is minimised.”

(Acas, ibid.)

Table 2: Evolution of the union learning representative role descriptor

	TUC, 1998:10	Acas, 2003:6	TUC, 2004:7
1	Generating demand for learning amongst members	Promoting the value of learning or training	Raising employees awareness of benefits of learning
2	Giving advice and information to members about learning	Providing information and advice about learning or training matters	Providing learning advice and guidance to employees
3	Identifying the learning needs of individual members	Analysing learning or training needs	Working with employers to identify learning needs
4	Representing members on problems with learning		Securing equal opportunities in learning
5	Negotiating agreements that incorporate learning		Negotiating learning agreements with employers including time off for study
6	Setting up and contributing to joint training or learning committees or forums with a similar remit to safety committees		
7	Working with employers to introduce, implement and monitor initiatives that can have benefits for members, e.g. Modern Apprenticeships, New Deal, Investors in People, NVQs	Arranging learning or training	Helping employers to establish employee development schemes

8	Arguing for and taking joint ownership of employee development schemes, which may be based on workplace learning centres		Establishing and running trade union learning centres
9	Liaising with colleges, TECs and other organisations to secure resources and support for workplace learning.		
10			Supporting innovative workplace development, such as Union Learning Fund projects
11			Monitoring quality of provision
12		Consulting the employer about carrying on any such activities	
13		Preparation to carry out any of the above activities	
14		Undergoing relevant training	

Comparing the role descriptors, one of the key shifts from the 1998 expectations of the role to those given in 2004 is in the term of reference for colleagues who union learning representatives represent and who receive the outputs of their activity, from 'members' to 'employees'. This suggests that union learning representative activity is on behalf of the employer rather than the trade union. From this it is proposed that union learning representatives occupy quadrant B. Another shift was the responsibility of the management and reporting of the Union Learning Fund (currently £21.5 million p.a.) from the LSCs to unionlearn, which presents unionlearn as an agent of the government rather than liaising with the LSC on behalf of the affiliate unions. This it is suggested shifts unionlearn to occupying quadrant D.

There is also a change in the nature of the lexicon of the dialogue that might be expected between union learning representatives and the employer from 'arguing for' (on behalf of members) to 'helping' employers establish employee development schemes. Again this suggests that union learning representative activity is on behalf of the employer and furthering the employers' initiatives. A further example of joint activity with employers is in the identification of training needs. Finally, there is a move away from the expectation that union learning representatives would 'liaise with funders (TECs) and providers (colleges)' to their activity 'supporting development such as ULF projects'. In reality such ULF projects would be developed and have secured funding for resourcing via proposals usually raised by Union Project Workers or Branch Officers, but certainly with the support of Branch Officers and Regional Officers and the buy-in of the employer. The role of the local union learning representatives would be to support and maybe deliver the outcomes for the project.

Another aspect of the TUC allocating responsibility to union learning representatives is their observation about how trade unions and their union learning representatives are making a major contribution to the government's Skills Strategy. This evidence is reported against the Skills Strategy's initiatives in 2004:

***“Employer Training Pilots:** promoting time off for training and brokering provision.*

***Learndirect:** supporting online learners in union learning centres within the Trade Union Hub.*

***Employee Development Schemes:** brokering schemes with employers to widen learning opportunities in workplace learning centres.*

Information, Advice and Guidance: *providing front-line support to learners and arranging learning needs analysis.*

Skills for Life initiatives: *raising awareness of the need for basic skills and brokering the provision of relevant learning events.*

Union Learning Fund: *supporting and running projects increasing union capacity in skills and learning. “*

(TUC, 2004:5)

From a layperson's perspective, this evidence suggests that union learning representatives were emerging as the panacea to overcome and redress the shortfall of skills provision within the workplace. Fulfilling these tasks would apparently also support the government in implementing the national skills strategy within the workplace. Again, rather a tall order for voluntary lay representatives of voluntary organisations. A further example of the distance between the rhetoric of national level PSHs to the reality of local level PSHs. The role of union learning representatives, as prescribed above (TUC, *ibid*), is considered to be the then TUC Learning Services' (unionlearn with the TUC's) expectations of the union learning representative initiative. Thus if these are their aspirations for the role, what was the reality and to what extent is union learning representative activity meeting the expectations of the TUC Learning Services (unionlearn with the TUC)? This role descriptor has been used to analyse the extent to which the espoused role compares to reported union learning representative activity from the primary data collected in the North-West region of England.

In 2004 the TUC identified the following challenges, within the government's Skills Strategy White Paper, which needed to be addressed if the skills needs of the economy and the personal development needs of the workforce were to be met. Too many employers, they said, undervalued the difference to a company's bottom line made by a better skilled and qualified workforce. They identified that this presented itself as a reluctance to invest in training the workforce and, in particular, in training low-paid and low-skilled employees. Evidence that many employers occupy the low interest quadrants of the power/interest matrix. The National Employers' Skills Survey is cited as reporting that only three in five workplaces provided training to an average of 53% of employees in the twelve months prior to the survey (DfES, 2004a:21). Furthermore, a lack of equity in the training system meant that a person with no qualifications was five times less likely to receive training than someone with a degree. Yet, in 2004, almost 30% of the workforce was not qualified to

level 2, with many of these people having a need for basic skills and information computer technology (ICT). The report goes on to cite the National Adult Learning Survey (2003), which found that the fewer qualifications someone has, the less interested they were in learning. Forty per cent of people with no qualifications were not interested in further learning and half of them were nervous about going back to the classroom (TUC, 2004:4). This suggests that a considerable number of employees occupy quadrant A in respect of workplace learning.

Reflections on Union Learning Representative Activity

The role of trade union learning representatives and the broader union learning agenda has become an increasing focus of academic debate. Union learning is seen as a key vehicle of workplace partnership, is argued to be central to the revitalisation of the trade union movement (Stuart and Cooney, 2004; Rainbird, 2003; Thompson et al., 2007), it has been enthusiastically promoted by the TUC, and was supported by the Labour government. Recent research has highlighted the extent to which union learning representative activity can re-energise union organisation and cement links between trade unions and workers (Thompson et al., *ibid*; Moore and Wood, 2007). An important source of evidence in respect of union learning representative activity has been the series of surveys commissioned by unionlearn (York Consulting, 2000; TUC, 2005; unionlearn with the TUC, 2007). A detailed analysis has been conducted on the data from the 2008 survey (Bacon and Hoque, 2008; Bacon and Hoque, 2010; Hoque and Bacon, 2011). From this analysis it is suggested that three key factors shape the impact of union learning representatives on the provision of workplace training: the existence of union learning centres; whether managers value union learning representative activity; and whether negotiation over training takes place. Saundry et al. (2010) reported on the 2009 survey of union learning representatives and their managers. Their analysis of the data from the 2009 survey argues that the commitment of employers to union learning may be reflected in, for example, organisations signing the Skills Pledge or developing a learning infrastructure within the workplace. These are important developments, but, such symbols in themselves will have limited impact. For union learning representatives to deliver positive outcomes both for their members and their organisations, employer engagement must be reflected within positive workplace relations and a collective bargaining framework that explicitly recognises the centrality of learning and training (Saundry et al., 2011).

For both the government and the TUC as national level PSHs, union learning representatives are key figures in the quest to develop and extend workplace learning. For trade unions they represent an infusion of 'new blood' and a way of forging new and stronger links with workers and members. However, whether they fulfil their potential depends critically on their activity as opposed to their simple presence within UK workplaces. This thesis is concerned with the extent to which union learning representative activity has met the expectations of its PSHs, and with the factors that determine the level and scope of union learning representative activity. However, given the largely voluntarist framework within which union learning representatives are embedded (Clough, 2007), and the limited extent of union organisation within the majority of organisations, the further development of union learning representative activity takes place within a challenging environment.

Other commentators' work considers the factors and issues determining the level and scope of union learning representative activity. In the previous chapter, the facilitators and inhibitors to workplace learning were discussed in line with the chain of governance for the union learning representative initiative and stakeholder mapping via the power/interest matrix (Johnson and Scholes, 1997). Costine and Garavan (1995) provide an example of the shift for unions from the low power/low interest quadrant A to the low power/high interest quadrant B of the matrix, and suggest reasons to move employees from the high power /low interest quadrant C to the high power /high interest quadrant D. Holden and Hamblett (1998) demonstrate the impact of the level of employer interest at the introduction of ED schemes, where low interest from the employer, alongside their high power, can result in employee opposition. Dundon and Eva (1998) and Wallis and Stuart (2007) provide evidence of the chain of corporate governance in practice, where at a national level, the state, employers and unions are keen to facilitate joint action on training. The evidence of practice at local level is of little joint action, thus demonstrating the impact of low interest but high power PSHs in the context of unions and learning.

Likewise, Ashton, in Rainbird et al. (2004), comments on the fact that trade unions traditionally show little interest in workplace learning, whilst activity at national level moved trade unions from low power to high power via the Union Learning Fund (ULF). Ashton (ibid.) refers to the Union Learning Fund (ULF) as an example of where the Labour administration had attempted to strengthen the operation of the market through the provision of information and training facilities for individuals.

According to Evans et al. (2006), the statutory rights for union learning representatives established by the 2002 Employment Act had the potential to encourage trade unions to make training, development and rights to learning more central to union concerns, either via collective bargaining or through partnership approaches with the employer. This was along with the new statutory role for union learning representatives designed to reach those employees in the lower levels of the labour market who have been excluded from training. Ashton comments, however, that:

“... this is not explicitly geared to enhance the workplace as a source of learning.”

(Ashton, in Rainbird et al., 2004:27)

Grugulis (2007) suggests that skills may also benefit employees and that, for trade unions and professional associations, training enhances members' expertise and thereby enhances the union's place in negotiations for pay and conditions. Also, employees who have the opportunity to participate in employer-sponsored learning and development are more likely to say they have career prospects and intend to stay with their employer (Grugulis, *ibid*:3). Finally, Saundry et al. (2010) confirm that, for the potential impact of union learning representative activity to be demonstrated, it is important that there is high employer interest, reflected in the nature of collective bargaining frameworks recognising the centrality of learning and training. This can have a fundamental influence on the level of employee interest (Findlay and Warhurst, 2010).

Conclusion

The aim of this chapter was to consider relevant literature on unions and their role in promoting and supporting workplace learning.

1. To acknowledge trade unions' involvement in education and learning in the UK.
2. To identify examples of union and employer partnership in promoting workplace learning.
3. To review literature specific to the union learning representative initiative.
4. To identify examples of the impact of the chain of corporate governance and stakeholder mapping via the power/interest matrix (adapted from Johnson and Scholes, 1997:198, as discussed in Chapter Two) within the sphere of unions and learning

In respect of the specific objectives, the literature review has identified recent history of trade unions' involvement in education and learning in the UK. Examples of union and

employer partnerships in promoting workplace learning have been considered and literature specific to the union learning representative initiative has been taken into account. What emerges from this literature review is that the issues identified as enhancers and inhibitors to workplace learning in the previous chapter on workplace learning are also significant issues in the support or otherwise of union learning representative activity. Application of the corporate chain of governance (Johnson and Scholes, 1997:186) to this scenario identifies this is an example of control of an initiative by national and regional level PSHs with the responsibility for implementation being with local level PSHs.

Figure 4 Stakeholder Mapping: the power/interest matrix re: union learning

		Level of Interest	
		Low	High
Level of Power	Low	A Government TUC (unionlearn) x1 CBI Employers Unions Union learning representatives Members/colleagues x3	B Government TUC (unionlearn) x3 CBI Employers x1 Unions x3 Union learning representatives x1 Members/colleagues x6
	High	C Government TECs x1 TUC (unionlearn) CBI Employers x3 Unions x1 Union learning representatives Members/colleagues x3	D Government x2 Tecs x1 TUC (unionlearn) x7 CBI Employers x3 Unions x5 Union learning representatives x1 Members/colleagues

Figure 3 above demonstrates the occurrence of a PSH occupying a quadrant on the model through the above discussion of the literature and secondary data. Unionlearn maintain

occupancy of quadrant D as at national and regional level they control the allocation of resources in line with the targets they are set by the Department for Business, Innovation and Skills (BIS). From the discussion, the reality at local level suggests the employer holds the power and their interest in initiatives such as ELD schemes and the union learning representative initiative is variable. Whilst employers can be encouraged to facilitate action when public funding is available the nature of the employment relationship in England means they are reluctant to seek support for activity from unionlearn via their local level trade unions. This position is supported by the above mapping.

The evidence suggests that at local level the interest of unions and employees requires further encouragement and development. The unions' interest appears variable dependant on the resource available to support activity. This position is supported by the mapping to an extent except the discussion of individual union participation in the discussion is based on policy documents from unionlearn and the TUC. These appear to enhance the level of power individual trade unions might have at local level.

The situations presented in the evolution and development of the union learning representative initiative demonstrate the shifts in power that occur between PSHs and suggests that often for projects to be successful a symbiotic relationship is required between PSHs. This appears to be especially relevant in gaining access to PSHs at different levels of the chain of corporate governance to that of the PSH driving an activity.

The following chapter will consider NVET policy issues that have influenced the development of the union learning representative initiative.

Chapter 5: union learning representatives and UK Vocational Education and Training (VET) Policy.

This chapter presents the findings from documentary research and a review of relevant literature. These sources reflect UK national vocational education and training (NVET) policy, commencing with the 1981 New Training Initiative, continuing with the training White Paper 'Employment for the 1990s' and ending with policy documents published up to Autumn 2100. The aim is to trace references to the development of the union learning representative initiative via UK NVET policy. The national TUC perspective on union learning representatives is discussed in Chapter Four of this thesis and identifies how those policies have been interpreted by national representatives of the employment relationship in the implementation of the union learning representative initiative in English workplaces.

The chapter will aim to answer the following questions:

1. What issues have driven the development of these policies?
2. What do these policies want to achieve?
3. What action is required from and between the principle stakeholders (PSHs) to implement the policy?
4. What can PSHs hope to achieve from the implementation of the policy?

The application of this research is to identify whether or not there is a constant in the aim of NVET policy as expressed and in the expectations of the PSHs, as expressed in their official documentation. As observed by Hamlin (1996:24), the state plays a major role in the country's vocational education and training. He goes on to identify the principal stakeholders (PSHs), citing Finegold and Crouch (1994):

- The employers
- The state
- The trade unions
- The providers of VET
- The individual

(Hamlin,1996:41)

As the list above illustrates, the PSHs identified by Finegold and Crouch (1994) mirror the PSHs to the union learning representative initiative identified in Chapter Two, except for 'the providers of VET'. The chain of corporate governance; (Johnson and Scholes, 1997:186) Figure 1, Chapter Two, page 29 and the stakeholder mapping power/interest matrix;

(Johnson and Scholes, 1997:198) Figure 2 Chapter Two, page 31, has been applied where appropriate to deepen our understanding of the relationship between the PSHs and NVET policy.

		Level of Interest	
		Low	High
Level of Power	Low	A	B
	High	C	D

The above unpopulated version of the power/interest matrix is provided as a key for the definition of quadrants throughout this chapter. Within the text occupancy by a PSH will be referred to as quadrant A: B: C or D where:

- A = low power/low interest
- B = low power/high interest
- C = high power/low interest
- D = high power/high interest

A National Perspective

The 1981 White Paper 'A New Training Initiative: a programme for action' moved the national picture forward. Hamlin, (1996) comments that the White Paper set out three primary objectives: one concerned with the apprenticeship system; another aimed at young people under the age of 18; and a third concerned with opportunities for adults.

Reid and Barrington (1997) go on to suggest these objectives demonstrate the government's concern over employment and unemployment, and reflect concern over other related issues, such as making skills training 'appropriate to the jobs available', with access at different ages. Adult training was to cover all at work including those returning to work. Reid and Barrington (ibid) suggest this was a reference to the widespread return to work of married women. The inference was that these issues were to be addressed by national programmes and not just to be decided by market forces.

From the employers' perspective, the Chartered Institute of Personnel and Development (CIPD) agree that, since the industrial revolution, employers have needed to train their

employees to make production more effective. Governments realised that the quality of workforces was an important factor in the growing competition for trade (CIPD, 2009, Accessed 22 November 2010.). Cutler (1992) comments on the nature of the national employment relationship from the end of the 1980s into the early 1990s and refers to the shift:

“From the British labour problem to the British training problem.”

(Cutler, *ibid*:162)

He continues that the British economic failure at the end of the 1970s and into the 1980s was designated by commentators as the ‘British labour problem’. The British labour problem was, as Cutler states, ‘tackled’ by the Conservative government in the 1980s. The Conservative government decreed that British workers had to be disciplined and trade unions curbed. Mass unemployment was seen to help management assert its right to:

“... introduce new equipment, control the allocation of labour and demand a more reasonable level of effort.”

(Cutler, *ibid*:162)

Cutler goes on to say that this did not create a new economic dawn for UK companies, as the subsequent trade crisis and recession showed. He moves forward a decade to a new prognosis, from the 1980s and into the 1990s, where the reference to a different version of the British economic problem was being discussed, where the central element was the perceived weakness of vocational training (Cutler, *ibid*:163). Furthermore, the expansion of vocational training was seen by commentators, both political and journalistic, as the key to improving economic performance. Cutler concludes that the popularity of training as a policy relates to political developments in Europe in the 1980s. An interesting observation of Cutler’s is that, as the Conservatives in the UK moved to the centre, it created an identity crisis, where training appeared as:

“a much safer way of differentiating the political product.”

(Cutler, *ibid*:181)

Lloyd (2012, accessed 3rd September 2012) observes that Cutler identified the ideological and political developments that precluded intervention against the market. This left education and training as one of the few acceptable policy options.

From the employee representatives' perspective despite unions' participation as equal partners in the Industrial Training Boards (ITBs) of the 1960s and '70s, and perhaps because of members' relative lack of enthusiasm for training, they had not campaigned hard for employee training rights except in the case of the training of health and safety representatives (Reid and Barrington (1999). Clough (2007:3) supports the position presented by Gallie (1991) claiming that the history of union involvement in training from the neo-corporatism of the 1960/70s, through the voluntarism of the 1980s/90s, demonstrated there had been significant capacity building in unions under New Labour, but the lack of collective bargaining over training had limited the impact of the broad union learning agenda in the workplace.

In December 1988 the training White Paper 'Employment for the 1990s' was published. The Secretary of State for Employment stated:

"The theme of this White Paper is the need to tackle barriers which could impede employment growth in the 1990s."

(Fowler, 1988. Accessed 3 January 2013.)

The following are a summary of the key points from this White Paper that relate to vocational training and the role of trade unions in NVET policy. The centre-piece of the White Paper was the plan to establish a nation-wide network of 82 employer-led local Training and Enterprise Councils (TECs) in England and Wales, and Local Enterprise Companies (LECs) in Scotland and Northern Ireland. The White Paper stated the councils' main value would be winning the commitment of employers and the local community to improve training arrangements. They were located in local geographic areas and replaced the Training Agency's centrally based activity. According to the UK Secretary of State for Employment, Norman Fowler, when the White Paper was published (December 1988):

"...Trade unions would be represented but only if they supported the council's aims. Trade unionists who did not support the aims of the new TECs would be automatically excluded..."

(Adapted from Fowler, *ibid*)

The paper stated that, to be credible, TECs had to emerge from within the local business community through employer leadership and broad public support. In England the Training Agency would continue to work with employers, the education service, training providers

and individual trade unions to improve the training system. There were also plans to introduce a national training programme to promote training within small businesses.

The White Paper stated that there were limits to what could be achieved by legislation but that unions had the urgent task of modernising themselves and their role if they were not to see their membership continue to decline. Furthermore, according to the government, an approach proposed within the European Community, of a model of worker participation to be built into European company status, was not the way to counter 'closed shops' within the UK:

“closed shop: a place of work where all employees must belong to an agreed trade union.”

(Concise OED, 1995:248)

A closing comment was:

“The Government believes that a local, employer-led, training system provides the best model for the future. It is at the local level that skills needs can best be identified and met.”

(Fowler, 1988, cited in Leadbetter and Gapper, 1988:19)

The response from the shadow Employment Secretary was:

“He is giving responsibility for the nation’s manpower planning to precisely those people who have failed to train even their own staff[...].”

(Meacher, 1988, cited in Leadbetter and Gapper, *ibid*:19)

The focus on learning throughout life, from cradle to grave, is termed 'lifelong learning'. Raggatt et al. (1996:1) state that the origins for the (then) surge in interest in lifelong learning and the learning society lay in the technological, economic, cultural and demographic forces that surrounded and affected adults plus the associated requirement for changes in attitude and behaviours. They commented that change was also a fact of life for employment. Further to this, they suggest the content of the learning opportunities was changing with the recognition that technological skills were not enough for an organisation to respond effectively and speedily to change in the environment. Softer skills, such as creativity, the ability to take the initiative, problem solving and the like, were also needed.

In 1991 seven aims were established for UK NVET policy via a further White Paper, 'Education and Training for the 21st Century'. The aims relevant to workplace learning were:

" 4. To ensure that people are more committed to develop their own skills throughout working life, and more willing to invest their own time, money and effort in doing so.

5. To help the long-term unemployed and those with other kinds of disadvantages to make their full contribution to the economy.

7. To encourage and increase employer commitment to training by having effective enterprise plans that complement work."

(Harrison, 2002:30)

Harrison (ibid) identifies some of the issues that arise from these aims. For individuals, she suggests there are few incentives to encourage them to invest in their own training because generally this would not be linked to increased wages and/or career prospects linked to national qualifications. Harrison acknowledges that some progress has been made by government to encourage both employed and unemployed individuals to participate in work-related learning. For example, via tax concessions in the 1990s. At the end of the 1990s the Trades Union Congress (TUC) had recently declared its strong commitment to the lifelong learning ideal. Reid and Barrington (1999) observed that a good example of training interventions from the trade-union sector came at the 1998 TUC annual conference:

"... which received and supported a call for union learning representatives in the workplace, plus learning centres in union offices, to bring learning into the bargaining process ..."

(Reid and Barrington, ibid:38)

In 1996 the then Conservative government merged the Department of Employment and the Department of Education into a single Department for Education and Employment. Hamlin, (1996) observes that following the election of the new Labour government in 1997, as they launched their 1998 Green Paper 'The Learning Age', they appeared to adopt the NVET system inherited from the previous administration without significant change. Hamlin (ibid:46) adds that:

"... in 'The Learning Age', however, the government set out a number of key principles and plans of action that presaged a further refinement of the system."

(Hamlin, *ibid*:46)

Such opinion for lifelong learning influenced activity within the UK, spurring, for example the Campaign for Learning. The Campaign for Learning was a national initiative launched in April 1996. The Campaign was due to run from 1996 to 2000 and was formed of a broad alliance of more than 130 organisations, including the TEC (Training and Enterprise Council) National Council, the Open University and several employers, including Rover; the initiative also had the support of the Conservative government. The aim was to give learning the 'hard sell', drawing on marketing techniques usually applied to promote consumer products (Employee Development Bulletin, 1996:78). This is a flavour of the context that greeted the new Labour Party administration on their election into office in May 1997. The Labour Manifesto 1997 included a statement on lifelong learning (Labour Party Manifesto 1997, accessed 2nd November 2010)

Post May 1997

The plans and pledges stated in the 1997 Labour Party manifesto were considered in the Fryer report (Fryer, 1997), which presented the case for the development of a culture of lifelong learning for all throughout the United Kingdom, whilst recognising that Scotland, Wales and Northern Ireland would wish to establish their own approach. This discussion will focus on England's response. By September 1997 the UK had become aware of the Labour government's reference to 'the third way'. Dickson (1999. Accessed 21 December 2012.) provides a summary of this ideology. Dickson states that it was a belief in the free market, democratic socialism, with a demand for management. The third way was in favour of growth, entrepreneurship, enterprise and wealth creation, but it was also in favour of greater social justice and saw a major role for the state in bringing this about. It espoused some values from the previous Conservative administration, but with a softer edge in respect of social justice. Le Grand, cited in Dickson (*ibid*), identifies four key values which appeared to underpin the third way. The first was a belief in the value of community, with institutions and individuals encouraged to co-operate with each other in constructive partnerships rather than compete with each other. Secondly there was a commitment to equality of opportunity and a commitment to reducing the levels of inequality. Thirdly there was a will to enforce the concept of responsibility. So, for example, with respect to the union learning representative initiative, those who wanted to improve their employability via learning and skills would be helped to do so, but it would be clear that each individual was responsible for their own employability. The fourth value according to Le Grand was

accountability. An exemplar of this was that individuals responsible to society and organisations, particularly public bodies, would be held to account. In addition, employees would be required to demonstrate how performance indicators had been met via outcome measures. Dickson comments that the third way was ambitious. It believed the public sector with the right alliances could deliver better services, transform society, reduce social exclusion, and reduce academic failure and family breakdown. The Fryer report (Fryer, 1997) demonstrates the spirit of the third way.

The issues that appear to have driven the development of these policies are the need to rethink and broaden the notion of lifelong education/learning in an attempt to improve the skills of the national workforce and reduce unemployment (Employee Development Bulletin, 1997:89). This was communicated as the call for a 'cultural revolution' in this country (England), to turn the vision of a learning society into reality.

"The UK is not at present a learning society, nor does it have a culture of lifelong learning or even a training culture."

(ESRC, cited in Fryer, 1997:1)

The CBI also declared that the UK's progress in education and training was:

"... inadequate for the scale of the competitive challenges the country faces"

(Fryer, *ibid*:1)

Fryer (*ibid*:3) states that these challenges featured in the economy and the labour market, in the need to meet increased competition, and in the requirement for new skills and capacities at work. It was felt that a culture of lifelong learning could act as a resource in the midst of change and, whilst some people in England were achieving high levels of competency and qualifications, there still existed a deep learning divide in society. He goes on to state that on one side of the divide are those who have attained qualifications and carry on with active involvement in learning throughout their lives. The Campaign for Learning referred to these individuals as 'improvers' (Employee Development Bulletin, 1996:78). On the other side, however, stand the majority, who have little evidence of formal qualification or achievement; people who have not been involved in systematic learning since leaving compulsory education. The Campaign for Learning identified two types within this latter category: 'strivers', who know that learning is useful but were not doing enough about it; and 'drifters', who were dissatisfied with their lives but not doing

anything to improve their situation. A further group identified by both the Campaign for Learning and Fryer have no wish or plans to engage in learning. There is also a category of unqualified people, labelled by the Campaign for Learning as 'strugglers', who neither value learning nor get involved in it (Employee Development Bulletin, 1996:78).

The Fryer report (Fryer, 1997) aimed to set out the case for the development of a culture of lifelong learning for all and presented a ten-point agenda of what they believed could be achieved within the 1997-2002 parliament. This demanded action from and between the principle stakeholders (PSHs) to implement the policy. According to Fryer (ibid), the successful expansion of workplace learning should be based upon a broad inclusive policy framework. He suggests the workplace is the only place where some people will engage in formal learning. Thus his report continues that workplace learning might not just be for learning directly related to current work needs but also for future personal and organisational learning needs. Further, all partners should recognise the value of learning which might not relate directly to the current job and support the development of broad key and foundation skills. In respect of promoting lifelong learning at the workplace, the following are identified as PSHs:

1. Government
 1. TECs and LECs - Investors in People, the University for Industry
 2. Employers and employers' organisations
 3. Employees
 4. Trade unions

Fryer (ibid) discussed these with reference to functions, roles and responsibilities in society as a whole as well as within the workplace. In respect of what these PSHs can hope to achieve from the implementation of the policy, according to Fryer (ibid.) the government was interested in developing a highly skilled national workforce, a workforce that is capable of responding to economic and technological change in both the medium and long term. Employers wanted to see a return on their investment, with workplace learning linked to improved business performance. This would be evidenced by improved efficiency, staff commitment, improved rates of productivity, and last but not least by adaptability to respond to changes as required. According to Fryer (ibid.), employees would expect learning opportunities to provide them with transferable skills, thus giving them the competence and knowledge that improves their performance in their current occupation

and also enables choice in their future career, individual development and personal fulfilment.

Fryer (ibid.) perceived that the active involvement of the trade unions would assist in legitimising the purposes and processes of workplace learning in the eyes of their members. This would help facilitate take-up of learning in the workplace by members. Fryer is careful not to state that this would be an opportunity for trade unions to organise and have something new to take to the bargaining table with the employers, in an attempt to regain ground lost during the previous Conservative administration. He does acknowledge however:

“Trade unions should seek to extend learning for their members in their own provision, through collective bargaining and collective agreements [...]”
(Fryer, ibid:50)

The discussion above provides an insight into the advice given to the Secretary of State in 1997 that informed the 1998 Green Paper ‘The Learning Age’. Within this Green Paper, the Labour government declared their intention to start a national debate about how the Learning Age could be realised. They claimed it was the first time a comprehensive policy paper had been produced encompassing the range of possibilities in developing education and skills from post-school to post-retirement. This was one of two Green Papers; the other was ‘Lifelong Learning’, which announced the government’s commitment to lifelong learning. The CIPD (2009, accessed 22 November 2010.) report that, following this, the TUC announced the establishment of a network of learning representatives, supported by the government-backed Union Learning Fund. The aim was to:

“... stimulate individuals to learn and to access new skills.”
(CIPD, 2009:5)

A review of the progress of Labour’s 1997 proposals for a skills strategy (Employee Development Bulletin, 1999:112) considers that the government had set itself ambitious targets to turn Britain into a learning society, one where individuals would recognise and take responsibility for their own learning and development. The shift in the type of employment available from manufacturing to knowledge-based industry had reached a stage where development of the workforce, it was suggested, needed to shift focus from low wages, low skills to high pay and high skill levels. In line with the publication of the

Employment Relations Bill in January 1999, it was reported that the government had signalled its intention of forming a new learning partnership with trade unions and was promoting their role in encouraging learning in the workplace. The 1999 Bill ensured new collective rights, a statutory procedure for trade union recognition and greater employment protection for those involved in union activities. Trade unions were identified as one of the social partners the government was keen to see taking a leading role in developing and fostering a lifelong learning culture in the workplace. It was reported that, despite being sidelined during the previous administration, trade unions were now keen to take this opportunity to become a focus for learning and development within organisations. In relation to the application of the models in support of stakeholder analysis presented in Chapter Two, by introducing the 1999 Bill, the government have placed the trade unions in quadrant D of the power/interest matrix (Figure 2 in Chapter Two, (Johnson and Scholes, 1997:198)) and this suggests trade unions would feature in the 'green for go' sector of the chain of corporate governance (Figure 1 in Chapter Two (Johnson and Scholes, 1997:186)). The 'new breed' of Union Learning Representatives, it was reported, would carry the torch for learning and development among workers and within the union (Employee Development Bulletin, 1999:112:13).

In 2001 TECs and LECs were abolished. The TECs and LECs had been widely criticised, as had been the government who was accused of providing insufficient funds and resources. TECs were accused of being over-bureaucratic and slow to respond to change (Reid et al., 2004:41). The CIPD (2009:5. Accessed 22 November 2010) reported they had never been embraced fully and the unions had opposed them because, in reality, they had had no voice within them. This suggests that, as PSHs, both employers and unions would locate themselves in quadrant B of the power/interest matrix. Harrison (2009:30-32) comments that unions in particular had to wait until the advent of the Learning and Skills Councils (LSCs) before being given a real voice in NVET planning. Furthermore, she observes that TECs formed some fruitful partnerships with employers but did not produce their intended outcomes fast enough. The mix of public and private funding had caused unease and they were caught between local needs and national training priorities (CIPD, 2009 Accessed 22 November 2010). In 2001 TECs were replaced by 47 LSCs, overseen by a national LSC that had responsibility for funding, planning, quality assurance and the delivery of all post-16 education and training, up to but not including higher education. Sector Skills Councils (SSCs) replaced Industry Training Organisations (ITOs) from 2002. Also in 2002 the provision of the Trade Union and Labour Relations (Consolidation) Act 1992, known as TULR(C)A, was

amended to provide rights for Union Learning Representatives, with effect from April 2003, to:

“... paid time off to carry out their duties; paid time off for training; protection against dismissal and detriment.”

(Acas, 2009:6)

This confirmed the government’s positioning of the trade unions in quadrant D of the power/interest matrix. An independent report from the Performance and Innovation Unit (PIU, 2001, cited in Harrison, 2009:32), identified the fundamental problem facing the UK’s economy: too many UK firms were competing on the basis of low cost/low added value and a low skill/low wage cycle. Consequently these employers had no incentive to up-skill their workforce or to improve qualification rates in the workplace. This locates the employers in quadrant C of the power/interest matrix and in the red, ‘rhetoric vs. reality’ section of the chain of corporate governance. The Labour government accepted this argument and, in line with their commitments in other Green and White Papers since 1998, issued its Skills Strategy White Paper in 2003. The 2003 national skills strategy sought to apply a demand-driven approach to three primary tasks identified by the PIU (2001):

“

- *To ensure, through lifelong learning policies, that all adults have basic employability skills.*
- *To focus on helping employers to rethink their business and organisational strategies around more ambitious high-performance /high-value-added goals that, to be achieved, will require them to invest in more highly skilled workforces.*
- *Alongside that, to adopt a far more demand-led approach to NVET provision, with employers and individual learners in the driving seat.”*

(Adapted from Harrison, 2009:33)

The aim was to ensure that employers had the skills to support the success of their business and employees had the necessary skills to be both employable and personally fulfilled. As regards the power/interest matrix, the government at this time appears to be keen to relocate the employers in quadrant D of the power/interest matrix and to facilitate a local level green sector of the chain of corporate governance. The skills strategy, ‘21st - Century Skills’, had three targets, once again aimed at addressing youth employment and

qualifications to level 2 via the apprenticeship scheme. This aimed to reduce the number of adults lacking a level 2 or equivalent qualification and to encourage at least one million adults already in the workforce to achieve a level 2 qualification between 2003 and 2006 (Harrison, *ibid*:37).

Harrison refers to this as the 2003 strategy for workforce development and cites an official definition of workforce development as:

“Activities which increase the capacity of individuals to participate effectively in the workplace, thereby improving their productivity and employability.”

(Harrison, *ibid*:33)

According to the CIPD (2009, Accessed 22 November 2010), the White Paper spoke of building a new skills alliance where every employer, employee and citizen played their part by integrating what already existed and focusing it more effectively. Harrison (2009) observes that priority was given to efforts to involve low-skilled adults and small firms, and the public sector as employer and purchaser, in view of their unique importance to the economy. The delivery framework is outlined by Harrison (*ibid*:34) at national level via the national LSC. The composition of LSC boards at national and local level was employers (40%) alongside trade unions, government and other voluntary groups. This suggests the positioning of the employers at regional level in quadrant B of the power/interest matrix. At organisational level, employers were to work closely with SSCs and regional development agencies to articulate organisational learning needs. And there was a role for trade unions encouraging and supporting workplace learning via the developing union learning representative network, via union learning representative with statutory rights and resourced by the Union Learning Fund. The White Paper defines ‘Strengthening the Skills and Training Role of Trade Unions’ as part of the tailored solutions for employers. From the employers’ perspective they might view this as a move by the government to put them in quadrant A of the power/interest matrix, compared to the trade unions quadrant D. As regards the chain of corporate governance this would place the employers firmly in the red sector.

The government invited comments on the White Paper and received 249 responses. These included 44 employers, twelve trade unions and three LSCs. The responses are not accredited to individual respondents but in summary the report claims that the Skills Strategy White Paper received an enthusiastic welcome:

“The expansion of the role of ULRs was very well received with respondents saying that this was a positive move which would be widely welcomed [...] many believed that moving funding around would not necessarily meet the many commitments promised within the strategy and that more specific funding should be made available.”

(DfES, 2003a)

This suggests that respondents would place the trade unions in quadrant B of the power/interest matrix. Concerns raised were reported too. In respect of union learning representatives:

“ULRs are key to motivating and supporting skills development amongst employees. What about the largely non-unionised small firms sector that will be untouched?”

(DfES, ibid)

Here respondents are suggesting that the SME employers and their employees need to be brought into quadrant D and accordingly the green sector of the chain of corporate governance.

The DfES response was:

“... the more responsive Business Support Network will offer support to enable small firms to develop their workforce. We are also testing the effectiveness of training a key worker or ‘Training Champion’ to act as an internal resource for small firms to help them identify and address their development needs.”

(DfES, ibid)

This suggests the government assume a shift from quadrant A to quadrant B for SME employers and their employees.

Another concern was:

“... there is a growing overlap between the respective roles of key players.”

(DfES, ibid)

This suggests a situation that would lead to conflict between the PSHs.

The DfES responded:

“The Skills Strategy set out clear expectations of the roles of the key players. The strategy sets out the need for partners to work together to achieve the overall objectives of the Strategy. That is why we have set up the Skills Alliance that, for the first time, brings together the key players at a national level and the Regional Partnerships to bring together the players at a regional level to meet regional and sectoral needs.”

(DfES, *ibid*)

The creation of a national Skills Alliance was communicated to employers and their employees as a strong partnership between business, unions, key government departments and agencies and others to deliver the ambitious reforms laid out in the Skills Strategy (DfES, 2003b).

In 2004 the Skills Alliance produced and published an executive summary of the DfES (2004b) Skills Strategy Progress Report. This acknowledges that this was still the start of the journey and that sustained commitment, over a period of years, was required to address the deep-seated barriers to skills investment and to the achievement of economic and social goals. It also highlights that government departments now had strategies in place for developing the skills of public sector employees to raise quality and productivity in public services (DfES, *ibid*). This positions the government as employer in quadrant D of the power/interest matrix and operating at ‘green for go’ (chain of corporate governance) at national, regional and local level. At this stage, trade unions and their union learning representatives were making a major contribution to the Skills Strategy (DfES, 2004a). There were now over 7,000 union learning representatives, 3,500 of whom had been trained that year, and of course there had been the introduction of their statutory rights. The ULF continued to be a success, enabling unions to use their influence with employers, employees and training providers. In addition, the results from the pilot placing Training Champions in small firms were encouraging and it was planned for this to be part of the LSC offer to employers (DfES, *ibid*:16).

In March 2005 the White Paper ‘Skills: Getting on in business, getting on at work’ was presented to Parliament. The focus of the White Paper was to take the infrastructure that had been established in response to the 2003 Skills Strategy and deliver real benefits for individuals, employers and the nation. By the time of the presentation of the White Paper it is claimed that there were 8,000 trained union learning representatives and it was proposed to:

“... support the growth of the network of trained Union Learning Representatives from 8,000 now to 22,000 in 2010.”

(DfES, *ibid*: Part 1:15)

Action was put in place to promote equal opportunities in training and employment via the work of union learning representatives, the development of Employer Training Pilots and the development of the Investors in People standard. For the purpose of this research the discussion will just focus on elements of the White Paper that are linked to the union learning representative initiative. In Part 2 the government identifies that employers can expect the reforms of the White Paper, implemented as part of the Skills Strategy, to deliver a framework for skills and training (DfES, *ibid*: Part 2:3). There was a commitment to deliver publicly funded skills training. Part of the offer was to be free training for employees needing employability skills, including literacy, language and numeracy, and the development of a long-term relationship to help employers build the skilled workforce needed to achieve business objectives. In addition there would be a stronger role for trade unions in promoting training in the workplace, particularly for low-skilled employees, and in pursuing the shared goal of raising employability and productivity for all (DfES *ibid*: Part2:4).

The trade union role in skills and training is discussed. It recognises the work trade unions had done to develop the range and profile of their role in training. Likewise:

“Both employers and employees can benefit from working together on skills. Building future employability through skills is an essential way in which unions can support the long-term interests of their members as well as promoting the success and productivity of the economy. Supporting skills and training should be at the heart of the role of the modern trade union, and we look to all unions to raise the profile of skills and training within their work.”

(DfES, *ibid*: Part 2:59)

A further role for the TUC and major unions was identified: to develop a network of union representatives in the Skills for Business Network, who would work with employers to secure the implementation of Sector Skills (learning) Agreements in the workplace. They would also provide information, advice and guidance (IAG) and share best practice with local union learning representatives. This would ensure trade union modernisation funds would be used flexibly to strengthen trade union capacity in training, including support for capital costs (DfES, *ibid*: Part 2:63). It was suggested the union learning representative role

descriptor was to be practiced not only within the union learning representative's employing organisations, but also union learning representatives ' would have the confidence and ability to practice the role in external organisations.

The White Paper describes how trade unions were establishing their place alongside the various agencies created to deliver the Skills Strategy. Unions were represented on all the SSCs, and on the Sector Skills Development Agency (SSDA). The government acknowledged they had played a valuable role in helping to shape the first pathfinder Sector Skills Agreements and, as demonstrated by the objective for 22,000 trained union learning representatives by 2010, it was clear the government wished to develop the valuable role trade unions were playing in addressing skills (DfES, *ibid*: Part 2:63). One of the key elements was support for adults to access training in the workplace through developing the union role in training. There would also be support for older learners to re-skill and up-skill throughout their working lives and beyond, and action to promote equal opportunities in access to training and jobs (DfES, *ibid*: Part 2:27).

"... Union Learning Representatives are playing a powerful role in reaching out to the groups who would otherwise face exclusion, giving them the support and confidence they need. Union Learning Representatives have been successful in engaging non-traditional learners including older workers, people from ethnic minorities, shift workers and those with low levels of literacy, language and numeracy. An estimated 80% of Union Learning Fund learners have qualifications below NVQ Level 2 or equivalent."

(DfES, 2003b: Part 2:218)

What is important for this research is that the 2003 Skills Strategy and the 2005 White Paper were providing the blue print for union learning representative activity during the timeline when the majority of the empirical evidence was being collected, that is between 2004 and 2006.

A further important piece of work completed was the 'Leitch Review of Skills: Prosperity for all in the global economy – world class skills', published in December 2006 (Leitch, 2006a). The Leitch review was commissioned by the Treasury in December 2004 to consider the skills profile the UK should aim to achieve by 2020 in order to maximise growth, productivity and social justice. Furthermore, the review found that, even if the existing targets to improve skills were met, the UK would then 'have to run to stand still'. At the

time of the review, Leitch stated that 70% of the 2020 workforce had already completed their compulsory education (Leitch, *ibid*:1). Thus, increasingly, adults would need to update their skills as working lives lengthened, particularly if the UK was to reach its 2020 ambition (Leitch, *ibid*:13). Leitch (*ibid*:10) considers the history of what he refers to as 'the UK's historic skills deficit', built up over a long period of time due to issues such as too little investment by employers (quadrant A of the power/interest matrix) in their employees, individuals taking too little responsibility for their own learning, and a qualification system 'divorced' from the needs of the workplace (quadrant A). He agrees that productivity is increasingly driven by skills.

"... highly skilled workers, who are five times more likely to be trained at work than low skill workers. Around one third of firms do no training at all and this varies from between 50 per cent of employers in some sectors to just under five per cent in the best performing sectors."

(Leitch, 2006b:12)

A further damning statistic was that over one in six young people were leaving school unable to read, write or add up (Leitch, *ibid*:16). Leitch reported, even if the then government's targets for the improvement of skills were achieved, by 2020 there would still be four million people who lacked functional literacy skills and over six million would lack functional numeracy skills (Leitch, *ibid*:13). Leitch asserted this shortfall will have profound implications for the UK economy and society. To succeed, he pronounced, the UK had to raise its sights and aim for world class skills, suggesting that this would require a new shared national mission:

"... moving beyond voluntarism and compulsion by forging a new compact between the government, employers, trade unions and individuals."

(Leitch, *ibid*:14)

The review concludes that in order to achieve world class skills the UK would have to commit to achieving the following objectives by 2020:

1. 95% of adults to have functional literacy and numeracy.
(from 85% literacy and 79% numeracy in 2005)
2. Exceeding 90% of the adult population qualified to at least Level 2.

(an increase from 69% in 2005)

3. Shifting the balance of intermediate skills from Level 2 to Level 3.
4. Exceeding 40% of the adult population qualified to Level 4 and above plus a commitment to continued progression.

(up from 29% in 2005)

(Adapted from Leitch, *ibid*:14)

This suggests individuals need to be moved from quadrant A to quadrant B of the power/interest matrix.

In the report Leitch recommended enablers to encourage work towards these targets, and one of these was for the government to work with employer representative organisations to support and encourage all employers in the UK to make a skills pledge. The pledge was to be a specific promise to the workforce that every eligible employee would be helped to gain basic skills and a level 2 qualification. The Investors in People (IIP) standard was to be used to engage employers in developing the skills of their employees (Leitch, *ibid*:20), in so doing using an established initiative to overcome some of the entrenched resistance to change in employers' facilitation of workplace learning. In an attempt to encourage a culture of learning that would enable individuals to invest in the development of their skills, Finally, the Leitch report proposed ensuring that individuals could afford to learn via a Skills Development Fund, overcoming immediate barriers for those wanting to improve their basic and level 2 skills (Leitch, *ibid*). Reviewing these recommendations in the cold light of day of winter 2012/13, it feels as if we are living in a parallel universe. The PSHs in the Leitch report are the same as those identified for this piece of research. If the above is what was perceived as necessary in 2005 to take the UK to a position of world class skills by 2020, then the future looks very bleak indeed. The maintenance of the tawdry levels of skill reported above from 2005 would appear to be optimistic given the economic situation in the UK since autumn 2008.

After 2006 but before the full impact of the current financial situation, commentators such as Harrison (2009) had expressed their reflection on NVET Policy. From the government's viewpoint, what has informed UK NVET policy over time is that the UK economy has been held back because of a major weakness in national productivity levels. These have been made worse by employers' failure to invest adequately in the training of the workforce

(quadrant C of the power/interest matrix). Harrison (ibid:29) went on to say that the UK's skills gap had widened from 1998 to 2008. The UK has an ageing workforce whose skills must be upgraded if business is to gain the best advantage from technological developments. UK employment levels were high in 2006 but 50% of those with no qualifications were economically inactive. Leitch (2006a:11) stated that the number of unskilled jobs in the UK was expected to fall from approximately 3.2 million in 2006 to 600,000 by 2020. According to PIU 2000:

"Training is associated with higher productivity gains than wage gains."

(PIU, cited in Harrison, 2009:30)

Two national bodies, who represent the views of UK employers, are the Confederation of British Industry (CBI) and the Chartered Institute of Personnel and Development (CIPD). Both have expressed their position in respect of the union learning representative initiative. The CBI (2010) defines itself thus:

"The Confederation of British Industry (CBI) is the national body representing the UK business community. It is an independent, non-party-political organisation, funded entirely by its members in industry and commerce, and speaks for some 240,000 businesses that together employ around a third of the UK private sector workforce."

(CBI, ibid)

In a joint statement in the foreword to *Brushing Up the Basics* (TUC and CBI, 2002), Sir Digby Jones (the then Director-General of the CBI) and John Monks (the then General Secretary of the TUC) state that, in a joint productivity report to the Chancellor, they highlighted the roles of government, employers and individuals in addressing the basic skills challenge. It goes on to suggest that employers can provide a wide variety of assistance, including signposting, one-to-one counselling and training staff volunteers as basic skills mentors. While this is happening, union learning representatives can encourage their members to learn and can work with employers to develop and deliver basic skills strategies.

Ron Aldridge (2005), the Chairman of the CBI Public Services Strategy Board, commented that union learning representatives had a crucial role to play in reaching individuals that managers cannot.

Richard Lambert, Director General of the CBI (CBI, 2006/07:5) commented that employers are responsible for training and developing their employees to meet business needs and where possible should assist in employees' long-term development; whereas, he felt, employees were responsible for their own development and employability beyond the needs of their current employment but may need support and encouragement to develop this level of responsibility. He added, government also needed to ensure that state-funded training is delivered efficiently and effectively. In his proposals for developing a skilled and competent workforce, he supports Lord Leitch's idea (as discussed earlier, this was originally presented by the Moser Report seven years earlier in 1999) of a pledge from employers to commit to participate in the then Labour government's Train to Gain scheme, aimed at helping low-skilled workers particularly those with poor basic skills. He goes on to comment that the need to improve skills at the intermediate level was essential if the UK was to create a knowledge-based economy. Later in the report, it is acknowledged that:

"There is some union involvement in training in companies where ULRs operate. Furthermore, ULRs can play a valuable role in encouraging employees to learn, particularly those with basic skills problems. The business and employees benefit most when learning reps work in partnership with the employer's training team."
(CBI, ibid:46)

However, later, on the same page, he adds:

"CBI RECOMMENDATIONS

Rights to time off and collective bargaining on training must be resisted – an individualised approach to skills works best"

(CBI, ibid:46)

This comment is published after the Acas 2003 guidelines in respect of 'time off for trade union duties and activities', and perhaps better illustrates what appears to be the employer response to the union learning initiative.

The CIPD (2004), whose members can have an advisory role to employers regarding people management and development issues in the workplace, state that senior managers have a significant role to play in identifying their organisation's perspective and attitude to

learning. As referred to above, this may be a positive, supportive perspective or it may not be, and there is a full range of attitudes in between those two extremes. The CIPD go on to introduce Trade Union Learning Representatives as:

“... a significant new source of expertise and engagement in promoting the learning agenda at work.”

CIPD (ibid:2)

The CIPD present the benefits of having union learning representatives in the workplace as follows:

- union learning representatives can be allies in promoting the value of learning and training to colleagues
- union learning representatives are affective in generating bottom-up demand for learning, creating wider demand for work-related training
- union learning representatives provide support for on-the-job learning
- union learning representatives are seen as having a significant role to play in engaging colleagues who might otherwise be reluctant to discuss their learning needs

It is noted that union learning representatives are trained and will have opportunities for further related training. It is hoped, therefore, that employers will recognise the value of releasing union learning representatives on paid time to complete their training and to carry out their role back in the workplace. The CIPD cite the then Department of Trade and Industry, who declared that union learning representatives are an inexpensive source of advice for employers. Furthermore, union learning representatives have the confidence of their members and union involvement will give added reassurance to colleagues. The CIPD suggests that the union(s) may provide an additional source of communication and information about learning opportunities through its internal structures and communication channels. This is seen to be particularly useful in reaching part-time and shift workers. Finally union learning representatives will encourage broader learning to meet employees' needs, rather than training that is just related to their current job.

As might have been predicted, the view of other commentators (Streck, 1989; Ashton, 2004; Westwood, 2004; Reid et al., 2004; Felstead et al., 2007; Grugulis, 2007; Harrison, 2009), as discussed elsewhere in this thesis, is that the employers' perspective on training

has been different to that of the government. Twenty-five years on from the findings in Cooper and Lybrand's (1985) report entitled 'Challenge to Complacency', Harrison (2009:30) presents similar conclusions as to why employers have failed over the years to invest in the kind of training prioritised by successive governments: unpredictable market conditions; the uncertain and often long-term returns on training and development investment; and a fear trained talent may be poached. This may explain the reluctance of the SME sector to support NVET policies even though they account for over half of the UK's turnover. Harrison expresses a view from Leitch (2006a) that employers have been unable to find a strong voice to express their view on future skills because the mechanisms that were intended to facilitate this were ineffective and inefficient. This places them in quadrant A of the power/interest matrix. No specific mechanisms are identified, but examples might include the TECs, as discussed earlier (Reid et al., 2004). Along with political change and the coming and going of ministers and governments, NVET policy has been revised and consistently dictated by government and not by employers' definitions of the skills gap problems and how they might be addressed, providing evidence there appears to have been little consideration of the resistance from PSHs to the government's change programme for NVET policy. Harrison (2009) cites Felstead et al.'s (2007) report on skills at work 1986 to 2006, which identified that informal work-based learning, as well as accredited learning, is central to up-skilling the workforce. It showed that employers are most concerned about specific knowledge and skills gaps in their own workplace that threaten the sustainability of their business; they want a demand-led system, driven largely by their own needs not government's or any other body's idea of what they need. This is further evidence of the lack of understanding of PSHs' drivers and resisters to government-led programmes of change. Harrison, citing Leitch (2006a) and Coffield (2007), comments that there have been attempts by government to actively involve employers, but each framework has proved inadequate; employers and individuals have continued to find NVET institutional structures and government funding overcomplicated, constantly changing, and lacking in clear, relevant and timely information and advice. This places employers and individuals firmly in quadrant B of the power/interest matrix.

The CIPD (2008:4) reported organisations' opinions about the extent to which their learning and development activity was been influenced by the Leitch Report. Just over a third of organisations felt their learning and development activity had been influenced, but over half (53%) did not feel their strategies had been influenced at all. Not surprisingly, public sector organisations were most likely to report some influence, whilst two thirds of private

sector companies reported no impact. Whilst 83% stated that the government should increase the funding available for technical/vocational skills, only 62% felt the government was right to prioritise funding on basic/lower level skills. Almost six in ten (57%) responded that employers have a clear responsibility to raise literacy/numeracy standards within the workforce, with 69% of public sector organisations responding that this is the responsibility of employers. In respect of NVET stakeholders, including unions, government and its agencies, employers as discussed above, educational and training providers, Harrison observes that they are:

“... often separated by more interests than could unite them.”

(Harrison, 2009:32)

Post May 2010

Looking at national policy from 1997 to 2010, what is striking is the similarity of the issues raised in comparison to the issues raised in the coalition government’s November 2010 strategy document, “Skills for Sustainable Growth” (BIS,2010a). There is some replacement of learning culture/lifelong learning with reference to ‘building the Big Society’. But still it is the improvement of skills that will underpin this purpose. It cites the shared responsibility of government, employers and individuals [(and their representatives)]. The ambition is for a world class skills base. The document also states that skills are not just important for our global competitiveness, skills also have the potential to transform lives through transforming life chances and driving social mobility. The document goes on to discuss the strategy’s principles and practice. The principles of the strategy are fairness, responsibility and freedom.

“ *Fairness: The government states it understands its responsibility to ensure that everyone has the basic skills they need to access employment and participate in civil society.*

Responsibility: It is claimed that the strategy can only succeed if the energy, commitment and power of individuals and employers is given full rein (BIS, 2010b:9). The UK Commission for Employment and Skills is to focus on becoming a vehicle for economic growth and social partnership, with employers, trade unions and others coming together to give effective leadership to business on skills.

Freedom: Control should be devolved from central government to citizens,

employers and communities so they can play a greater role in shaping services to ensure that they meet their needs efficiently. We will free providers from excessively bureaucratic control and centrally determined targets and radically simplify the formulae which determine funding for adult education, so that providers can effectively respond to the needs of business and learners. “

Adapted from (BIS, 2010b:7)

This suggests there is a will to move individuals and employers into quadrant D of the power/interest matrix. Relating this to the chain of corporate governance, the above shows that ‘green for go’ only exists for the national level representatives of the PSHs and practice at local level, where it exists, persists in the red sector where ‘rhetoric vs reality’.

Unions have been encouraged to contribute to the ‘supply-side’ agenda and help their members into learning up to level 2 qualifications to help meet government targets. However, management prerogative has remained over which employees have access to opportunities for higher levels of skills formation and their utilisation (Clough, 2007). Unionlearn with the TUC comment that the skills strategy makes a number of positive references to the overall role of the unions in the context of social partnership and especially in relation to the role of union learning representatives. They go on to say that part of the agenda is a commitment to convince employers of the need for better skills utilisation, including looking at skills as part of a wider approach to modernising the workplace, for which close discussion with employees is essential (unionlearn, 2011a:2). Furthermore, unionlearn confirmed it had received a new funding agreement from the government of over £21 million for the year 2011-12 (unionlearn, 2011b:2).

Conclusion

In conclusion, this chapter has identified the context from the mid-1990s within which the principal stakeholders became concerned with issues of lifelong learning for the UK adult population and, in particular, for this piece of research, the UK workforce. This has been seen to influence the direction of the national skills strategy under the previous Labour government, and what emerged in the coalition government’s skills strategy document by November 2010. Four questions were set at the beginning of the chapter:

1. What issues have driven the development of these policies?
2. What do these policies want to achieve?

3. What action is required from and between the principle stakeholders (PSHs) to implement the policy?
4. What can principal stakeholders hope to achieve from the implementation of the policy?

The evidence presented suggests that, in response to question one, issues driving the policies relevant to this research in 1981 centred around concerns within the government in respect of the discipline of the UK workforce, and issues related to employment and unemployment and the skills match between the unemployed and the jobs available. The state saw education and training as an acceptable policy option to apply in an attempt to address some of these issues.

From 1981 onwards there was a clear attempt by government to provide a meaningful 'cradle to grave' vision for NVET, along with a consistent long-term policy in relation to training for employment (Harrison, 2002). In 1988 the driver was identified as barriers to employment growth. The proposals relied upon the decentralised, voluntary and market-led system introduced in 1989. By 1998 the driver was an attempt to improve adult literacy and numeracy, and the aim to create a national culture that would stimulate and support lifelong learning and initiatives in relation to that learning (Harrison, *ibid.*). Adult basic skills were also the driver in 2003.

As regards what it was hoped these policies would achieve, in 1981 the aim was to raise attainment for apprentices, young people overall, and for adults. It was identified that skills training had to be appropriate to the jobs available and support social changes. In 1988 there was a shift from a centralised approach to NVET to the establishment of local employer-led Training and Enterprise Councils (TECs), in order to get the commitment of employers and local communities to improve training relevant to their local occupational profile. The aim was to create a demand-led approach to NVET, with employers and individuals in 'the driving seat'. In 2003 the aim was to increase adult basic skills and to encourage employers to consider the development of high performance, high value and therefore higher skilled workforce. The hope expressed by Leitch in 2006 was for growth, productivity and social justice. By 2010 the aim remained the achievement of a world class skills base for the UK. The impact of this improvement in skills would support the coalition government's ideal of 'the big society'.

In order to implement the policies, it is clear that action was required from and between the principle stakeholders (PSHs). With the shift from centralised control of NVET to regional TECs, the Training Agency (a government agency) was required to work with employers, providers and individual trade unions. The 1988 proposals required leadership by employers. By 1999 the focus was clearly on the government working with the trade unions. In 2006 there was a call for a new compact between the state, employers, trade unions and individuals. There was also the intention for the government to work closely with employers via the Skills Pledge initiative. Investors in People was identified again as a vehicle that could help government encourage employers to include learning and development as part of their strategic planning, and to consider the learning and development needs created by all business decisions. Once again there was the call for individuals and employers to work together with the idea that employers, trade unions and others would provide leadership for business on skills development.

Finally in considering what PSHs hoped to achieve from the implementation of these NVET policies. In summary it is claimed that under the Conservative government in 1981, it appears the aim was to discipline the UK workforce and to curb trade unions in the workplace. At this time, employers sought effective production and/or service delivery. By 1997/98 the government were seeking a highly skilled national workforce. Whilst employers were looking for a return on any investment in training, with workplace learning linked to improved business performance via gains from efficiency and improved productivity. There is evidence to suggest that employees sought transferrable skills, which would in turn provide improved performance and improved career opportunities. The TUC and its affiliate trade unions sought to extend learning and development opportunities for their members. In 2010 the government reported 'modernising the workplace'. The nature of which would depend on the state of the employment relationship. Given that this occurs under the Conservative/Liberal Democrat coalition government suggests it would be different in nature to what might have occurred under the previous Labour government.

Chapter 6: Methodology

Introduction

The introduction of union learning representatives to the ranks of trade union lay officers provided the stimulus for this research. The vision from the TUC was that this group of volunteers would be able to achieve similar results in the field of learning and development as health and safety reps had achieved in respect of health and safety issues within the workplace. In July 2003 the opportunity to tender for a commission, to complete an investigation that would provide a benchmark of union learning representative activity in the North West of England TUC region, was received. The tender was successful and the survey that was completed provided the majority of the empirical evidence for this research.

One of the aims of the research was to find out the extent to which union learning representatives were able to practise their prescribed role in the workplace. The ultimate aim of the union learning representative was to facilitate learning and development for individuals who typically did not get the opportunity to engage in learning and development activity. This has informed the design of the research.

The process implemented initially required the author to gain a clear understanding of how TUC Learning Services North-West Region operated in relation to the union learning representative initiative. In addition, it was important to learn how individual trade unions were accommodating the initiative into their existing structures and protocols. The final step was to gain insight into how union learning representative activity operated within the workplace. The author's existing knowledge and understanding of workplace learning and the employment relationship suggested from whom and where it was necessary to gather opinion and evidence of experience of union learning representative activity in action.

This initial process provided a benchmark of union learning representative activity within the North-West region of England. Along with this the author gained insight into the facilitators and inhibitors to union learning representative activity in the North West. This completed the first stage of the research project. From there, it was identified that the role of the principal stakeholders was crucial to the facilitation or otherwise of union learning representative activity and this developed the research question for this, the next, stage.

The research question for this piece of research is:

“To what extent is union learning representative activity meeting the expectations of its principal stakeholders?”

The following objectives were set in order to provide an informed response to the research question:

6. To identify the principal stakeholders (PSHs) to the union learning representative initiative from 1997 to 2008
7. To identify the intent of PSHs for the union learning representative initiative from an analysis of relevant PSHs’ policy documents from 1997 to 2008
8. To investigate PSHs’ expectations of the union learning representative initiative
9. To identify and describe shifts in PSHs’ expectations of the union learning representative initiative from 1997 to 2008
10. To provide a critically informed account of the extent to which those expectations had been met by the May 2010 general election

The aim of this chapter is to explain how appropriate data was collected and analysed to answer the research question. The objectives set for this chapter are:

1. To justify the research philosophy.
2. To identify and explain relevant data collection methods used to meet the objectives stated above.
3. To explain the design of data collection tools applied to the process.
4. To explain sampling decisions used to gather data from PSHs about the union learning representative initiative.
5. To identify and provide informed opinion in respect of response rates from PSHs.
6. To explain the choice of methods applied in the analysis of both secondary and primary data.

Research Philosophy

Ontology is how we see our world (McGoldrick et al., 2002) and is concerned with the nature of reality (Saunders et al (2012). This research takes an objectivist approach:

“Objectivism is an ontological position that asserts that social entities exist in reality external to and independent of social actors.”

(Saunders et al., ibid: 131).

Taking this research project as an example to illustrate this assertion, national vocational education and training policy exists in reality external to and independent of the social actors who have been tasked with implementing the union learning representative initiative as part of that policy.

Epistemology is defined by Saunders et al. ibid as:

“concerns what constitutes acceptable knowledge in a field of study.

(Saunders et al. ibid.:132)

This research reflects a realist philosophy. According to Saunders et al. (2007:573), realism is an epistemological position that acknowledges a reality independent of the senses, one that is accessible to the researcher’s tools and theoretical speculations. It implies that the categories created by scientists refer to real objects in the natural or social worlds. Saunders et al.

(ibid.:105) refer to direct realism as:

“what you see is what you get”.

(Saunders et al., ibid.:105)

Realist researchers want to discover the mechanisms that under-pin events and are concerned that their theories should be verifiable (Fisher, 2007). Fisher (ibid) presents a quote from Miles and Huberman (1994) that presents this position:

“We think that social phenomena exist not only in the mind but also in the objective world – and that some lawful and reasonably stable relationships are to be found between them. The lawfulness comes from the regularities and sequences that link together phenomena. From these patterns we can derive constructs that underlie individual and social life...[we] do not use ‘covering laws’ or the [] logic of classical positivism.”

Miles and Hubermann (ibid:5) cited in Fisher (ibid:19)

This investigation proposes that union learning aims to facilitate some type of workplace learning via employee development (ED). The structure and terms of reference for activity are constructed and agreed by the PSHs. In order for activity to take place there has to be action and co-operation between the PSHs. This is representative of the notion of stakeholder theory

and the relationship between PSHs can be regarded as a psychological contract. Realists can compare and contrast the subject(s) under investigation and issues related to it (them); the objectives defined for this study present the intention to compare union learning representative activity to the PSHs' expectations of it. Conclusions are then drawn from the evidence about the extent to which it answers the research question. For this investigation it is proposed that the common link across the PSHs is the desire to provide a skilled and competitive workforce for the UK. This is visible at a macro level from a national perspective and at micro level from a local perspective, from national vocational education and training (NVET) policy to learning and development and employee relations policies and agreements within organisations.

A realist world consists of real objects, and real causal power, and these exist regardless of our knowledge of them (Holden et al., in McGoldrick et al., 2002:84). The reality of the union learning representative initiative may have a different focus for each PSH. Realist social theory must adjudicate between the empirical and the theoretical so, when constructing an abstract model of social reality, there is a need to ensure that theoretical concepts are grounded in concrete reality (Holden et al., in McGoldrick et al., *ibid*:84). Thus, in this instance, the notion of the union learning representative initiative is based on stakeholder theory. The idea is that any activity within the initiative depends upon certain attitudes and actions from PSHs. It is anticipated that the various PSHs may have differing perspectives on issues related to the initiative and there will not be clear-cut explanations of issues. According to Holden et al., in McGoldrick et al.

"...a realist methodology in the field of HRD must also confront the primary objective of research to facilitate self-emancipation through the recognition of objective interests on the part of employees."

(Holden et al., in McGoldrick et al., *ibid*:83)

This research aims to identify the extent to which the union learning representative initiative has met the expectations of PSHs; however, the data collected only provides third-party evidence from the PSHs as to the extent to which it appears to have met the objective interests of employees.

This research project uses a deductive approach. The research strategy was specifically designed for the purpose and the findings have been compared to an existing body of theory as discussed in chapters Eight and Nine

A realist research philosophy has informed the methods selected for data collection and analysis. The research has been mixed-method, using firstly qualitative then secondly quantitative and qualitative data collection techniques and analysis procedures (Saunders et al., 2007:602). The research pursued a sequential approach, as the initial documentary enquiry and qualitative research informed the design of the quantitative methods of data collection (survey questionnaires). Following the analysis of quantitative data from the union learning representative, affiliate unions and employer questionnaires, further qualitative data collection methods (focus groups and semi-structured interviews) were applied to investigate key themes emerging from the research, in order to explore PSH decision-making further.

From a realist philosophy, the data collection methods that are chosen must fit the subject matter, quantitative and qualitative (Saunders et al, 2012) . The data collection methods used were valid for this investigation, as is proven by the fact that the findings have enabled the researcher to present an informed response to the research question and to meet the objectives set for the research. The data collection methods selected, and the data collection tools as designed, produced data that was able to be analysed and provided a measure by which the research question could be answered. As regards the reliability of the data collection methods and tools, these would still be consistent over time as long as the prescribed union learning representative role descriptor (TUC, 2004:7) remained the same.

It is claimed that the knowledge generated from the research in the North-West region of England will also be true for union learning representatives in other geographic locations. Some generalisability can be given to the findings, as the sample of participants studied is representative of the wider population of union learning representatives. In particular, this applies to the findings from the quantitative method of survey questionnaires, since the distribution of these was to all union learning representatives listed on the unionlearn database. Also the PSHs concerned with the union learning representative initiative are representative of its wider population, since the structure is replicated across the six unionlearn geographical regions in England. In respect of the findings from the qualitative data collection methods, it is acknowledged that participants' responses could be either what they perceive the researcher wants to hear or the truth. Thus the qualitative methods were used to develop an understanding of the results from the quantitative findings and to illustrate those points with examples from actual experience of union learning representative activity.

Ethical Considerations

In considering the ethical issues of this research project, guidance has been sought from key UK higher education and research bodies. The Nottingham Trent University (NTU) Code of Practice for Research has been consulted, as has the University of Central Lancashire's (UCLan) Code of Practice for Research. The topic "Policy into practice: to what extent is union learning representative activity meeting the expectations of its principal stakeholders?" merits further research by meeting the requirements for transfer from MPhil to PhD according to the NTU Business, Law and Social Science College Research Degrees Committee.

The Association of Business Schools (ABS) presents eight categories of ethical principles, (ABS/BAM/BMAF (accessed 2009), Version 28, October 2009) all of which have been met by this research.

The categories considered in this section have been informed via reference to Fisher, (2007).

Ethical Practice

In confirming the researcher's ethical practice reference is made to Robson, (2011:201) who raises ten questionable practices in social research. The researcher is able to confirm that in the data collection for this research that:

1. Participants were aware and informed of their participation in the research.
2. Participants were not coerced to participate
3. The true nature of the research was clear in all communicated with participants.
4. There was no deception of participants.
5. No participation diminished their self-esteem
6. No activity violated people's rights
7. Participants were not exposed to physical or mental stress.
8. Did not invade their privacy.
9. No benefits were given to any participants.
10. All participants were treated fairly and with respect.

It is acknowledged that this is a self-reporting account of ethical practice but aims to confirm that practice was in line with the ethical considerations as discussed in the previous section.

Informed Consent

In respect of this research project, it is claimed that all participants gave their informed consent to their participation in the research. The majority of the quantitative data was gathered via survey. It was not necessary to raise consent forms for these data collection activities as respondents were able to self-select as to whether they responded or not.

Attendance at focus groups and other events was by invitation. Respondents were able to self-select regarding their attendance and participation in the discussions. The records of discussions from these events were confirmed as accurate by the relevant union full time officers who also attended each event

Participation in semi structured interviews were agreed with each interviewee, the transcript of the interview was provided to the interviewee for confirmation that it was accurate and represented the spirit of their contribution.

Commission

The research was commissioned by the then TUC Learning Services North-West Region (now unionlearn with the North-West TUC). The commissioner of the research set the following objectives for the investigation:

1. To identify the extent of union learning representative activity, and its impact on workforce development, within the region.
2. To identify issues that enhance and inhibit union learning representative activity.

The invitation to tender was received in June 2003. In preparation for raising the bid the author had an exploratory meeting with the lead Development Worker at TUC Learning Services North-West Region. This was to ascertain if any similar work had been completed previously and also to understand better what TUC Learning Services North-West Region wanted to achieve from the research project

Data collection commenced January 2004

Data Collection Methods

The following section explains the choice of data collection methods applied, and data collection tools designed, to facilitate data collection to meet the objectives, as given at the start of this chapter. It is asserted that these data collection methods are representative of a realist epistemological position. Primary data from PSHs to the union learning representative initiative have been collected over six phases as detailed below.

Data Collection Phases

Phase One:	Semi structured interviews with TUC Learning Services North-West Region Development Workers and Project Workers
Phase Two:	Union Learning Representative Survey One (referred to as ULRS1) Affiliate union survey Employer survey
Phase Three:	Focus group events (referred to as FG01, FG02, etc.) LSC interviews
Phase Four:	Union Learning Representative Survey Two (referred to as ULRS2)
Phase Five:	Participant as observer
Phase Six:	2009 National survey of Union Learning Representatives and their managers (referred to as 2009 survey)

The PSHs to the union learning representative initiative have been identified as: the UK government and related agencies; the TUC; unionlearn; affiliate unions and their members; employers.

Questionnaires are often used as part of a survey strategy. They collect descriptive and explanatory data about opinions, behaviours and attitudes (Saunders et al., 2007:394). The sample size and geographic spread of the sample for each survey identified postal, self-completion questionnaires as the most appropriate primary data collection tool for these surveys (Bryman and Bell, 2003:141). The two North-West region of England union learning representative surveys were census surveys (Bryman and Bell, *ibid.*) of the union learning representative population. The two union learning representative questionnaire surveys provide a unique longitudinal dataset that allowed the author to explore the nature of union learning representative activity over time with questionnaires sent to all those registered on the TUC Learning Services North-West Region database at each survey. It is

possible that some respondents will have replied to both surveys. However, as individuals are not identified, analysis is limited to aggregate level change between surveys and no attempt is made to investigate change at an individual level. In the presentation of the findings, data from the first survey will be referred to as ULRS1 and data from the second survey as ULRS2.

The first North-West union learning representative, affiliate union and employer surveys were followed up by focus groups to investigate the key findings from the survey in more depth. Focus groups were chosen for a number of reasons. Focus groups are group interviews and are useful to focus upon a particular issue since they require interactive discussion amongst participants (Carson et al., 2001, cited in Saunders et al., 2007:339). Effective facilitation of a focus group enables a closer control and focus on the issue being discussed. In this case focus groups gave access to the views, experiences and perceptions of a relatively large number of union learning representatives in a cost- and time-efficient manner. They also provided an informal and supportive environment (when contrasted to a formal one-to-one interview) in which participants could express their views (Krueger, 1994). Finally, and most importantly, they allowed the researcher to take advantage of the dynamic interaction between participants and hear their differing views and experiences (Merton and Kendall, 1996). This provided key insights into the complexities of the social processes underpinning the operational reality of union learning representatives.

Semi-structured interviews were used to interview TUC Learning Services employees and also representatives from North-West region of England Learning and Skills Councils (LSCs). The advantage of semi-structured interviews is that questions that are not included in the interview guide may be asked as the interviewer picks up on things said by interviewee (Bryman and Bell, 2003:343). The flexibility gives the interviewee the chance to speak freely, therefore resulting in a wider range of information collected in the interview. Furthermore, the data collected will be predominantly qualitative, generating information that will give greater understanding and reasoning for the figures produced by the quantitative research. The author/researcher's role as participant as observer has allowed her to take part in union learning representative activity in the same way as the 'real' research subjects (Saunders et al., 2007:605).

The 2008/09 union learning representatives and their managers' survey was a national survey, designed and distributed in partnership with unionlearn with the TUC. This too was a self-completion questionnaire and distribution was by both postal and electronic means. The

affiliate union (North-West region of England) was a postal survey and the distribution of the employer survey was by both postal and electronic means.

Phase One

Phase one was designed to sketch the context of union learning representative activity. This was achieved by conducting semi-structured interviews with all Development Workers and the majority of Project Workers within the TUC Learning Services North-West team. A semi-structured interview schedule provided an aide-memoire of the key issues to be discussed with each interviewee. The semi-structured interview, however, allows the opportunity for the interviewee to respond to questions in the way that seems sensible to them (Fisher, 2007:159).

Interviews with TUC Learning Services Development Workers and Project Workers were conducted in order to understand how TUC Learning Services delivered their side of the initiative within the North-West region of England.

At that time the North-West region of England was split into:

1. Lancashire
2. Greater Manchester
3. Merseyside
4. Warrington and Cheshire

Each area had a designated regional post-holder known as a Development Worker (DW) and a number of Project Workers (PWs), who were usually on secondment from employers in the area. Within the TUC Learning Services North-West Region, Development Workers had line management responsibility for a number of Project Workers. An agenda for the meetings was designed and forwarded to each Development Worker and Project Worker in advance of the semi-structured interview. The aims of these semi-structured interviews were:

1. To enable further understanding of the union learning representative role
2. To gain information about the structure of TUC Learning Services North-West Region

3. To gain knowledge and understanding of the role of TUC Learning Services North-West Region in developing and supporting the union learning representative initiative
4. To gather information about TUC Learning Services' expectations of the union learning representative role, at the differing levels of the organisation
5. To gain awareness of protocols when investigating the union learning representative role via affiliate unions

Copies of the document sent to DWs and PWs prior to the discussion are shown in Appendix 1 of this document. Development (DW) and Project Worker (PW) interviews were completed as detailed below:

<i>Merseyside</i> : DW x 1 PWs x 3	9 th October 2003 17 th October 2003 11 th December 2003 19 th December 2003
<i>Greater Manchester</i> : DW x 1 PWs x 9	5 th November 2003 6 th November 2003
<i>Cheshire and Warrington</i> : DW x 1 PWs x 5	20 th November 2003
<i>Lancashire</i> : DW x 1 PWs x 2	18 th December 2003 8 th January 2004
North-West TU Education Manager:	17 th October 2003
Learning Services National Hub Manager	3 rd February 2004

Phase Two

Phase Two was an exploratory study in order to provide an overview of union learning representative activity. It was carried out by a census postal survey. The questionnaire was developed from the 2003 national survey (York Consultancy, 2003) conducted on behalf of TUC Learning Services (national team). A further postal survey was distributed to 61 full-time officers of all affiliate unions represented in the region. This questionnaire was designed to obtain the views of affiliates as to the operation of union learning representatives. To gain the opinions of employers in the region, a postal and electronic version survey was designed and distributed.

S1: Union Learning Representative survey

The union learning representative questionnaire was designed in consultation with the Regional Manager of TUC Learning Services North-West. This questionnaire was to be distributed by post to all union learning representatives on the TUC Learning Services database.

The commissioner decided that he would like the regional survey to replicate, to some extent, the design of the survey used for the national union learning representative survey that had been completed by York Consulting for TUC Learning Services in 2003.

Thus the survey York Consulting had used was the initial starting point for the design of the survey to be used within the North-West region of England (see Appendix 2). The original survey sought to collect data under a number of headings. These and the section headings for the two regional union learning representative surveys are shown in the table below, along with the sample size and response rate.

Section	York Consulting (2003)	TUC North-West Learning Services (ULRS1)	TUC North-West Learning Services (ULRS2)
1.	Biographical details	Personal & Workplace details	Personal & Workplace details
2.	Becoming a Learning Rep	Becoming a union learning representative	Becoming a union learning representative
3.	Training as a Learning Rep	Union learning representative training	Union learning representative training
4.	Learning Rep Activities	Union learning representative activity in the Workplace	Union learning representative activity in the workplace
5.	Learning Needs in Your Workplace	Support for union learning representative activity	Arrangements that support your union learning representative role
6.	Support for Learning Reps	Arrangements that support your union	Statutory rights for union learning representative activity

		learning representative role	
7.	Employer/Union Agreement on Learning	Barriers that inhibit your union learning representative role	Barriers that inhibit your union learning representative role
8.	Learning Reps Legislation	Personal achievement	Personal achievement
9.	Keeping Track of Your Learning Rep Activities	Additional information	Additional information
10.	Impact		
11.	Successes		
12.	Barriers		
13.	About You		
Total issued	3,800 (approx.)	1,739 records	1,540 records
Sample		1,605	1,469
Distribution:	July 2003 Ret. by: 15 th August 2003	1 st February 2004 Ret. by: 20 th February 2004	February 2006 Ret. by: 17 th March 2006
		23 rd February 2004 Ret. by: 12 th March 2004	March 2006 Ret. by: 12 th April 2006
		July 2004 Ret. by: 23 rd July 2003	
Response:	798	583	235
Rate:	21%	36.5%	16.1%

Union learning representative questionnaire design process

As stated earlier, the commissioner was keen to replicate the 2003 national survey within the region to enable the findings to be compared to the national findings. A telephone interview, with the York Consultancy researcher who designed the 2003 union learning representative National Survey, revealed that the design of her survey was based on the initial national survey completed in 2000. This aimed to gather data around the following key areas:

- a. the profile of union learning representatives

- b. tracking changes in the demographic of union learning representatives from the traditional middle-aged, male stereotype to a demographic that better represents the profile of the workforce
- c. identifying the level of awareness amongst union learning representatives of the union and organisational structures they need to connect with in order to support and enhance their role

From this conversation, the initial draft of the union learning representative survey was designed (03 DraftQULR01, Appendix 4.) This document represents the initial attempt to design a questionnaire that would enable comparison of the regional data to the national data and would also develop some of the areas to be investigated. The questionnaire was also to gather data in line with the project's objectives as set by the Regional Manager (commissioner), and as previously mentioned in this chapter in the section headed *Commission*.

The batteries of questions asked, within each section, map against the aims and replicate the 2003 survey, see Appendix 4.

Revision of questionnaire

The first round of revisions to the draft questionnaire was completed and the format of the original word document was revised into a format that more closely resembled a questionnaire, with the support of the UCLan Strategic Development Service (SDS). At that time SDS provided support to academic staff carrying out research by postal survey. The revisions, and the explanations for these, are displayed in Appendix 4.

The revised version of the union learning representative questionnaire was ready for 15th December 2003 (see Appendix 4). This was forwarded, for review, to the Regional Manager (commissioner of the project). The questionnaire was piloted via Development Workers and Project Workers based at TUC Learning Services in Liverpool plus any union learning representatives they interacted with over the next three days. It was also piloted with a colleague who was an Employee Relations specialist and a colleague who was working as a Research Fellow at the time. We presented our findings from the pilot at a meeting on 19th December 2003. From this discussion with the Regional Manager, a further set of revisions/amendments were identified. These are reported in the table in Appendix x.

The revised and final version of the questionnaire is presented in Appendix 4. The numbering glitches were overcome with the support of a colleague from SDS.

Affiliate union survey

The meeting with TUC Learning Services Regional Manager (commissioner) and the TUC Regional Secretary in December 2003 discussed the second aim for the research:

“To identify issues that enhance and inhibit union learning representative activity.”

It was important to gather data on the opinions of the affiliate unions in the region. The affiliate unions are fundamental to the union learning representative initiative and are one of the principal stakeholders in the union learning representative initiative. As discussed in the literature review of union learning in Chapter Four, the affiliate unions have a tradition of supporting learning in their occupational area. The introduction of the union learning representative role was also seen as an opportunity for enhancing organising activity.

In preparation for the meeting with the commissioner, a draft Affiliate Questionnaire was designed as a basis for discussion. The draft presented the following categories for data collection:

1. Biographical data
2. The Union and union learning representatives
3. union learning representative Appointment and Training
4. union learning representative Capacity
5. union learning representative Activity in the workplace
6. union learning representative Activity

Draft affiliate questionnaire

The commissioner had stated a preference for a survey on one sheet of A4. It was requested that an additional question be designed to ask how union learning representative activity was acknowledged within the union's structure. In the revised version of the survey (see Appendix 5), this became question 2.3 and different types of recognition variables were

given, including ‘other’, to select from in a tick box response. Other additions requested for Section 2 were questions investigating how often union learning representative issues are discussed by the union at national level, at regional level and at branch level, and whether or not union learning representative activity was a standing item on the agenda for branch meetings.

These questions were for TUC Learning Services to gain insight into the extent to which union learning representative activity was regarded as a core activity of the union. The battery of questions from 2.7 to 2.11 addressed these issues.

TUC Learning Services were also keen to identify how unions were responding to the learning agenda. How was consideration of the learning agenda being reflected in their policy areas? What resources were the unions putting into driving forward these policy areas? Which officer was responsible for this area of work? What was their role title, key activity? And was this allocated as a separate or additional responsibility for union officers? Question 2.4 addressed the issue of union officer responsibility.

In Section 5, the section looking at ‘barriers to union learning representative activity in the workplace’, it was requested that ‘Access to union support’ be added. This was further qualified in the final version in a revised tick box selection of barrier variables to ‘Lack of access to union support’.

The revised version of the affiliate questionnaire presented the following categories for data collection (see box below). Where possible, questions were personalised to refer to ‘your union’ rather than referring to ‘the union’. As detailed below, where relevant, the same variables were used in tick box selections as were used in the union learning representative survey to allow comparison between what unions reported about the union learning representative experience and what union learning representatives reported via their responses.

Section	Notes:
Contact Details	
The union and union learning representatives	
Union learning representative Appointment & Training	Within this section, unions were asked how satisfied they were with the initial training their union learning

	representatives completed and the opportunities provided to them for their further development. The tick box question on further development courses used the same variables as the union learning representative survey.
Union learning representative capacity	Within this section, TUC Learning Services sought to identify the extent of record-keeping by the union via regional and national databases that facilitated the identification and tracking of union learning representatives.
Support for Union learning representative Activity	This section asked the union a similar battery of questions as those asked of union learning representatives regarding the amount of paid time given and unpaid time given to union learning representatives for union learning representative activity.
Procedures that support the union learning representative role	This section focussed on procedures unions have put in place to support the union learning representative role at national, regional and branch level. It also asked about the union's satisfaction with union learning representatives' access to TUC Project Workers.
Barriers that inhibit the union learning representative role	This offered the same range of variable as in the barriers section of the union learning representative questionnaire.
Union learning representative activities	Again the choice of variables is the same as in the union learning representative questionnaire.
Union learning representative achievement	
Additional information	
Invitation to focus groups	This was to give all unions the opportunity to request a focus group event for their union learning representatives and officers.

Through the work with TUC Learning Services since the start of the project, the protocols that had to be observed when communicating with union learning representatives and their unions had become apparent. The TUC Regional Secretary explained his interpretation of the affiliate unions in the North-West region of England.

There were 50 affiliate organisations in the North-West region of England at this time. According to the TUC, six of those organisations were 'sophisticated' in their organisation

and interaction with the TUC. Furthermore twelve of those organisations 'know what to do in first instance in respect of their organisation'. There were also some small new financial affiliates, who, for example, did not have formal structures at that time.

As a minimum the TUC wanted the affiliate questionnaire to go out to all the affiliate organisations in the region. It was identified that if the questionnaire was sent to the most appropriate officer in the first instance then it was more likely to be completed and returned. Again, the TUC were keen to maximise the response rate. In line with protocols for communication, the TUC committed to ringing unions' head offices to identify to whom and where the questionnaire should be sent.

The TUC Regional Secretary categorised the affiliate unions in the region as follows:

UNISON – Biggest union

AMICUS - still seen to be operating in two parts, MSF/AEU

CWU

GMB – two regions

PCS

T&G

USDAW

These affiliates were identified as 'sophisticated' and willing to organise union learning representatives to attend focus group events. Again in line with protocols, access would be gained via the Regional Manager and the TUC Regional Secretary, who would make the initial approach to the affiliates to suggest and offer to arrange focus group meetings.

There was a second tier of affiliate organisations including:

GMPU/CMS

BFAWU

The TUC Regional Secretary committed to doing a 'ring around' to identify to whom to send information, and to supplying the contact list by mid-January 2004.

Employers' survey

As discussed earlier in this paper, employers' buy-in to the union learning representative initiative is crucial to union learning representatives' ability to practise in the workplace. Thus it was important to gather data that would provide an insight into employers' attitudes and opinions about the union learning representative initiative.

This survey would contribute data to meet the fourth objective set for the research project (see Appendix 1 for all objectives in detail):

"To identify issues that enhance and inhibit union learning representative activity. For example, impact of legislation (April 2003) regarding paid time off to fulfil union learning representative duties and activities, support for union learning representative activity within the workplace. Level of resource allocation to support union learning representative activity: time, budget, forum for discussion."

The aim for this questionnaire was therefore to gain insight into employers' views of the union learning representative role. In order to do this the following objectives were set to identify the data to be collected from this questionnaire:

- I. To identify which organisations are most likely to support union learning representative activity, by sector and number of employees
- II. To identify the level of formalisation of union learning representative activity in organisations
- III. To identify the application of statutory rights for union learning representatives
- IV. To identify examples of positive and negative employer experience of union learning representative activity

These objectives informed the questionnaire design. The design of the initial draft of the employers' survey (mk1) was as detailed in the table in Appendix 6.

The commissioner was actively involved in the design of the employer questionnaire. The initial draft was reviewed and revisions made to the structure of the questionnaire and the variables (see Appendix x).

The third draft of the employer survey incorporated these revisions. As with the union learning representative survey, the logos for TUC Learning Services North-West Region, the North-West Development Agency and UCLan were inserted in the header of documents. The commissioner decided, however, that for the employer survey it was advisable to remove the TUC Learning Services North-West Region logo from the document as it was felt it might discourage some employers from responding to the survey. An example of the final version of the survey can be found in Appendix 6. The surveys were produced and distributed.

Phase Three

Focus group events

Phase Three was to explore a number of the issues identified in the initial postal surveys in more depth. Given the large size of the sample, it was decided to achieve this through the use of focus groups. Overall nine focus groups were conducted involving six unions. In addition, three union learning representative events were attended and qualitative data gathered through non-participant observation. Semi-structured interviews were conducted with Learning and Skills Council (LSC) North-West Region's Workforce Development Managers. These managers negotiate (d) with unionlearn with the North-West TUC regarding the allocation of funding to support union learning representative activity within the North-West region of England.

Focus groups were arranged in conjunction with TUC Learning Services who identified a 'contact' within the affiliate union. Each event was chaired by the author and supported by a Learning Officer from the union concerned. Either a Development Worker or Project Worker from TUC Learning Services also attended to give TUC Learning Services' view of the research. Attendees were a mix of union learning representatives, senior stewards, and full-time officers, although not all groups were represented at each event. Overall seventy-seven union learning representatives attended the focus groups.

Schedule of focus group events

Focus Group	Date	Union	Venue
FG01	5 th October 2004	PCS	Liverpool
FG02	1 st November 2004	PCS	UCLan, Preston
FG03	7 th December 2004	GPMU	Daresbury, Cheshire
FG04	21 st December 2004	Unison	Manchester
FG05a*	25 th January 2005	Unison	Birkenhead
FG06	9 th February 2005	BFAWU	Bolton
FG07	10 th February 2005	UCATT	Liverpool
FG05b*	28 th February 2005	Unison	Birkenhead
FG08	29 th April 2005	GMB	Warrington
FG09	23 rd September 2005	Amicus	Manchester

* only one attendee so further event was held on 28th February 2005

The decision as to which unions were represented in the focus group phase of data collection was dictated to some extent by the response rate of their union learning representatives to the survey (see Appendix 8). The decision was also made in response to their indication in the Affiliate Survey that they wished to be included. Finally, where it was ‘politically’ appropriate for TUC Learning Services in the North West to offer the opportunity for a focus group to a particular affiliate union, they were then included. Despite many attempts by the author and the commissioner, it was not possible to arrange an event for TGWU nor CWU. An USDAW event was not arranged because they have always trained their own union learning representatives and therefore had little contact with TUC Learning Services, although their National Learning Organiser was at most of the TUC Learning Services’ events attended by the author within the region. Where possible, the affiliate union officer, with responsibility for the union learning representative initiative within the region, sent out the joining instructions for the event (see example for PCS, Appendix 7). This was to encourage union learning representatives and officers to attend by showing them the event was ‘owned’ by their union. A common schedule of issues was used as a framework for discussion for all of the groups. This schedule was informed by the analysis of the quantitative data from the questionnaire stage of the research. See Appendix 7 for the initial schedule that was used at the first focus group event. Appendix 7 also features the discussion schedule for the penultimate focus group event.

The discussion schedule was used to inform the facilitation of the groups. As can be seen from Appendix 7, the first example was used for a PCS event and was more of an aide-memoire to facilitate the discussion. After the first two events, the schedule was produced as an agenda for the events and this was issued to delegates at the event. This was to inform the participants about what they could expect to be asked to discuss and where possible give them time to consider the issues before verbalising their responses. The original discussion schedule was revised to be in line with the 'agenda' issued to delegates and continued to be used as an aide-memoire to ensure common data was gathered from each event.

In order to ensure that participants spoke freely, the focus groups were not tape recorded. Instead, key points emerging during the focus groups were recorded on a flip chart, while more detailed notes were taken by the facilitator. Each focus group lasted between one-and-a-half and two hours. At the end of each focus group, the notes were then written up by the facilitator. These formal minutes of the event were then forwarded to the union Learning Officer and the TUC Learning Services Development Worker or Project Worker who had attended the focus group meeting for verification that they represented the content and spirit of the discussion and opinions expressed.

LSC interview Schedule

Date	Role	Region
5 th May 2005	Workforce Development Manager	Warrington and Cheshire
17 th May 2005	Workforce Development Manager	Greater Manchester
1 st June 2005	Regional Skills Director	Liverpool
1 st June 2005	Workforce Development Manager	Merseyside
19 th June 2006	Director of Skills	Lancashire

The aim of the LSC interviews was to identify North-West region of England LSCs' view of union learning representative activity, from the Workforce Development Managers' experience to date, and to understand how LSCs would like to see it progress. A common interview schedule was designed to gather data in line with the aim from each intervention (see Appendix 8, for interview schedules for 2005 and 2006).

The interview schedule was labelled as a 'Discussion Schedule'. This was to give a positive indicator of the nature of the intervention to the interviewees. As discussed previously, at this time the LSCs provided the funding for union learning representative activity within the

region. It was important to provide them with a transparent process. Appointments were made by telephone, where possible with the interviewee themselves. Confirmation of the appointment and the 'Discussion Schedule' were then emailed to them, for their perusal ahead of the appointment. Following each intervention, minutes of each meeting were produced and forwarded to the interviewee for approval and verification that they were an accurate record of the discussion. They were also asked to confirm they were happy to have the outcome shared with the commissioner at TUC Learning Services North-West, with whom each of them contracted and negotiated funding to support the initiative in the region for each financial year.

Phase Four

Phase Four was a further detailed postal questionnaire distributed to all union learning representatives listed on the TUC Learning Services database as at 31st December 2005. In December 2005 TUC Learning Services North-West Region requested that the research project be extended to facilitate a further census survey of union learning representatives in the North-West region of England. The following revised objectives were set for the extended project:

1. To identify issues related to the Employment Relations Act 2002, statutory recognition for Union Learning Representatives from the 2004 survey to the 2006 survey.
2. To identify developments in affiliate unions' practice in establishing and sustaining their union learning representative activity.
3. To identify the type and level of support required by union learning representatives and their unions for sustainable union learning representative activity.
4. To identify if learning activity via union learning representatives encourages the further development of union organisation in the workplace and/or if union organisation encourages learning activity in the workplace.

Union Learning Representative survey 2

The aim of the second ULR2 was to identify the extent of union learning representative activity within the region at a given point in time. The objectives were:

1. To gather statistical data on the number of union learning representatives within the region by union and by employment sector

2. To gain insight as to why or why not individuals choose to become union learning representatives
3. To identify the level and source of union learning representative training completed by these union learning representatives
4. To identify issues that enhance and inhibit union learning representative activity. For example, impact of legislation (April 2003) regarding paid time off to fulfil union learning representative duties and activities, support for union learning representative activity within the workplace. Level of resource allocation to support union learning representative activity: time, budget, forum for discussion.

The final version of the ULRS1 (see Appendix 4) was used as the basis for the 2006 survey. This was to facilitate longitudinal analysis of the findings where appropriate. The following sections were identified as overall headings to gather data against the above four objectives:

Objective	Section	Topic
Objective 1	Section 1	Personal and workplace details
	Section 8	Personal achievement
Objective 2	Section 2	Becoming a union learning representative
	Section 7	Barriers that Inhibit your union learning representative role
	Section 8	Personal achievement
Objective 3	Section 3	Union learning representative training
Objective 4	Section 4	Union learning representative activity in the workplace
	Section 5	Arrangements that support your union learning representative role
	Section 6	Statutory rights for union learning representative activity New section to meet the statutory rights element of objective 4.
	Section 7	Barriers that inhibit your union learning representative role
	Section 8	Personal achievement

Once the first draft of the S2 questionnaire had been designed and created, it was piloted via the TUC Learning Services North-West team and with three UCLan colleagues, two of whom are experts in survey design, data entry and analysis. The other colleague is a Reader in International Employment Relations. See Appendix x for the table that provides an overview of the revisions made to the ULRS1 survey and the amendments made following feedback from the pilot survey. The final version of the ULRS2 survey can be found in Appendix 9.

The surveys were produced. The front cover of the survey at S2 was a letter from the Regional Manager TUC Learning Services North-West Region (see Appendix 9). This was to reinforce that the survey was on behalf of TUC Learning services. The questionnaires were again distributed by post to union learning representatives' home addresses with a cover letter (see Appendix 9) and self-addressed envelope (SAE) for return to UCLan. The cover letter for the follow-up S2 distribution of the survey also had an additional page asking recipients who now considered themselves to be inactive union learning representatives to respond with details of how long they had held the union learning representative role and when and why they had become inactive, as had been asked at this stage at S1.

Principal Stakeholders' Expectations of the union learning representative Initiative

Completion of the methodology to this stage of the research project and analysis of the data led the author to identify how this data, supplemented with some further documentary research, would facilitate an investigation into the extent to which union learning representative activity was meeting the expectations of the PSHs.

After considering the findings from the secondary and primary research completed to date, the following have been identified as fundamental to sustaining current involvement and the further development of the union learning representative initiative. The initiative is still evolving and requires continued nurturing and support to develop and sustain it. There is an urgent need to review and revise the information management systems to and from the principal stakeholders to audit the outputs from funded activity. The process needs to encourage and as far as practicable facilitate feedback of evidence of outcomes, achievements and to highlight emerging needs. There is a need for continuing awareness raising and education about the initiative for some of the principal stakeholders, i.e. union officials, and officers. There is a need for information, advice and guidance for employers. Unionlearn and the affiliate unions need to access appropriate employer forums to encourage meaningful dialogue on the agenda and raise awareness via evidence as to what effective activity can achieve and what is required to underpin such activity. Unionlearn and affiliate unions should identify and develop progressive learning/training opportunities existing to support the evolving union learning representative role as union learning representative activity develops and/or changes.

Further work

As discussed in Chapter Five, other work in the area of the role of trade unions in workplace learning (Rainbird, 2000a; Rainbird, 2000b; Rainbird, Fuller and Munro, 2003; Clough, 2005; Forrester, 2004; Wallis, Stuart and Greenwood, 2005) investigates the impact of the opportunities presented by the learning agenda for trade union renewal, as well as the opportunities for increasing union density, and also, to some extent, the influence of the nature of the employment relationship within organisations on facilitating the learning agenda. A key issue that emerges from previous research (Wallis et al., 2005; Stuart and Cooney, 2004; Rainbird, 2005), and from data produced by the first stage of this research, is that union learning representatives themselves are unclear about their role. Are they educators or organisers? The data from the initial stages of this research would suggest that, for many unions, the answer is both. However, the evidence from the first four phases of this research project suggests that many of the tensions and problems identified within the literature, and from this research, are caused by attempting to champion union learning representatives as a new body of union organisers. This apparent ambiguity over the expectations of the union learning representative role informed the next stage of this research: to establish the extent to which union learning representative activity has met the expectations of the principal stakeholders. As a result of the first four phases of this research project, the research question proposed became:

“To what extent is union learning representative activity meeting the expectations of its principal stakeholders?”

The Fryer report (Fryer, 1997:48) suggested the principal stakeholders (PSHs) in promoting lifelong learning at the workplace should be employers, employees, trade unions and government. This thesis proposes that any activity from the union learning representative initiative is dependent on certain attitudes and actions from PSHs.

Phase Five

Participant as observer

Phase Five was ‘participant as observer’, as the author attended and completed the training to become recognised as a University and College Union (UCU) union learning representative and

was subsequently elected to the role of UCLan UCU Branch Learning Officer. Saunders et al. (2007:605) describe the 'participant as observer role' of the researcher as:

“Observational role in which the researcher takes part in and observes activities in the same way as the ‘real’ research subjects. The researcher’s identity as a researcher and research purpose is clear to all concerned”.

(Saunders et al., ibid:605)

The author identified there was the opportunity to be a 'participant as observer' as the Branch Learning Officer in 2006. It was appropriate for her to stand as a union learning representative because Learning and Development is her subject area, her job title is Senior Lecturer in Employee Development. Elected onto the Branch Committee at the 6 December 2006 Annual General Meeting, she has been attending Branch Meetings since 20th December 2006, and completed the UCU union learning representative training programme as detailed below:

Stage 1:	Solihull College	17-18 October 2006
Getting Organised – The role of the Trade Union Learning representative		
Stage 2:	Northumberland College	28-29 March 2007
Supporting Workers on Learning and Skills		
Stage 3:	Northumberland College	9-10 May 2007
Working with Employers on Learning and Skills		

Following the successful completion of the training, a proposal for the development of the Branch Learning Officer role and union learning representative activity in the branch was put to the branch committee at a Branch Committee Meeting on the 23rd May 2007 (see Appendix x).

At the time of writing, the author continues to hold the role of Branch Learning Officer.

Phase Six

Phase Six involved the collection of secondary data via documentary research and made use of responses from respondents identifying themselves as being in the North-West region of England, from the 2009 National Unionlearn Survey of union learning representatives and their Managers.

2009 national unionlearn survey of union learning representatives and their managers

On June 19th 2009 the author and two colleagues were awarded the contract for the 2009 national union learning representative and their managers survey by unionlearn. The author managed the project, which ran from 1st July 2009 to publication of the findings at the 4th Annual unionlearn Conference on 12th July 2010.

The sample frame for the initial survey of union learning representatives was unionlearn with the TUC's database of union learning representatives. This consisted of 10,713 individual union learning representatives. For the first time, separate questionnaires were developed in respect of active and inactive union learning representatives. This was done for two reasons. Firstly, it is possible that a significant number of questionnaires would be completed by inactive union learning representatives, thus skewing the overall results and giving an unrealistic picture of union learning representative activity. Secondly, it was felt important to ask inactive union learning representatives specific questions to shed light on the reasons for them ceasing their work. In total, 1,292 union learning representatives responded to the survey. Of these 968 responses were received from active union learning representatives and 324 responses were received from inactive union learning representatives. Furthermore, 22% responses were from union learning representatives in the North-West region of England. Data from this and from the managers' survey is analysed and applied in order to update data on PSHs, and this is reported in the statement of findings for this thesis in the following chapter.

The 'active' questionnaire (see Appendix 11) was relatively detailed and contained questions asked in previous national surveys, but also included new batteries of attitudinal questions relating to employer support, member attitudes to learning, and the impact of the recession. The 'active' questionnaire was piloted in two regions: the South West and the North West. These were chosen to reflect different demographic and industrial characteristics. The overall pilot sample was 64. Questionnaires were distributed through a

range of methods with opportunities for respondents to provide feedback on the general design and composition of the questionnaire. As a result of the pilot, a number of minor modifications were made to the questionnaire to ensure clarity and consistency. In addition, as a result of comments made by pilot respondents, it was decided to develop an electronic version of the survey. The 'inactive' questionnaire was much shorter in order to maximise response; it targeted demographic data while probing for information regarding reasons for inactivity (see Appendix 11).

Both union learning representative surveys were initially distributed by unionlearn by post in October 2009, with a cover letter (see Appendix 11) and a pre-paid return envelope. Respondents were also given the opportunity of responding to an electronic survey, details of which were also circulated to affiliate trade unions. Subsequent reminders were sent by post and (where possible) electronically.

Union learning representatives were also asked to provide contact details for their managers who had responsibility for union learning issues. Details of 264 managers were received. A separate questionnaire was designed (see Appendix 11) for managers and this was sent out, accompanied by a cover letter (see Appendix 11), electronically (where e-mail addresses had been provided) and also by post.

Attendance at and involvement in other events

Date	Event	Venue
12 th November 2003	Presentations on development of project	Mechanics Institute, Manchester
16 th January 2004	North-West TUC Learning and Organising Conference	Everton Football Club, Liverpool
25-26 March 2004	Trade Unions and Lifelong Learning Conference	Carlisle
24-26 April 2004	ISTC union learning representative Conference	Blackpool
27 th November 2004	Workplace Learning Who controls the agenda? A conference for Union Learning Representatives (CWU, T&G, Amicus, Unifi, USDAW)	London Metropolitan University, London
June 2004	Unionlearn Launch Event	TUC Congress House
2005 to 2012 Steering Group Member	Unionlearn with the North-West TUC Steering Group Meetings	Liverpool

4 th March 2008	The Skills Pledge	Lancashire County Cricket Club, Old Trafford, Manchester
27 th November 2008	Illuminating Learning: a celebration for unions across the North West	Blackpool
2007, 2008, 2009, 2010	Unionlearn Annual Conference	TUC Congress House
	Unionlearn Research Seminars	
2012 to date Steering Group Member	UCU ULF Project and steering group meetings	North-West Region

Attendance at and involvement in the above events has enabled the author to develop her knowledge and understanding of how the union learning representative initiative is working in the North West and other regions, and within different unions.

Survey Distribution and Samples

ULRS1 survey

This was a census survey to all trained union learning representatives who appeared on the TUC Learning Services database as at 31st December 2003. The surveys were produced and distributed by post to union learning representatives' home addresses with a cover letter (see Appendix 4) and a SAE for return to UCLan. The final cover letter also had an additional page that asked recipients who now considered themselves to be inactive union learning representatives to respond with details of how long they had held the union learning representative role and when and why they had become inactive.

Total issued	1,739 records
Sample	1,605
Distribution	1 st February 2004
Mailshot	Ret. by: 20 th February 2004
Follow-up 1	23 rd February 2004
	Ret. by: 12 th March 2004
Follow-up 2	July 2004
	Ret. by: 23 rd July 2004
Responses	583
Response rate	36.5%

Affiliate survey distribution and sample

The postal survey was distributed to 61 full-time officers of all affiliate unions represented in the region. The pack contained the survey, the covering letter from the TUC Regional Secretary and an SAE for return to UCLan. This questionnaire was designed to obtain the views of affiliates as to the experience and operation of union learning representatives. A total of 26 questionnaires were returned, a response rate of 42.6%.

Total issued	61 records
Sample	61
Distribution	February 2004
Follow-up	Ret. by: 17 th March 2004 June 2004
Response	26
Response rate	42.6%

Employer survey distribution and sample

This was a census survey to all employers for whom there were contact details on the TUC Learning Services North-West Region union learning representative database. Distribution was by post to employer addresses with a cover letter (see Appendix 6) and an SAE for return to UCLan. The commissioner was keen to receive a good response from the employer survey as he had been for the union learning representative survey. Thus an electronic version of the survey was issued to 431 employers. These were all involved in or associated to call-centre activity and affiliated to UCLan via a NWDA-funded enterprise project. Of a sample of 1,281, there was a response from 67, which equates to a response rate of 5.2%. Claims cannot be made from such a low response rate, so the evidence presented from this survey should be viewed simply as a flavour of employer opinions from the responses received.

Total issued	1,281 records
Sample	1,281
Distribution	September 2005
	Ret. by: 30 th September 2005
Response	67
Response rate	5.2%
Electronic survey	
Total issued	431 records
Sample	431
Distribution	September 2005
	Ret. by: 30 th September 2005
Response	5
Response rate	1.16%

ULRS2 survey distribution and sample

The front cover of the survey at S2 was a letter from the Regional Manager TUC Learning Services North-West Region (see Appendix 9). This was to reinforce that the survey was on behalf of TUC Learning services. The questionnaires were again distributed by post to union learning representatives' home addresses with a cover letter (see Appendix 9) and SAE for return to UCLan. The cover letter for the follow-up 2 distribution of the survey also had an additional page that asked recipients who now considered themselves to be inactive union learning representatives to respond with details of how long they had held the union learning representative role and when and why they had become inactive as had been asked at this stage at S1.

Total issued	1,540 records
Sample	1,469
Distribution	February 2006
Mailshot	Ret. by: 17 th March 2006
Follow-up 1	March 2006 Ret. by: 12 th April 2006
Follow-up 2	May 2006 Ret. by: 26 th May 2006
Response	235
Response rate	16%

2009 union learning representatives and their managers survey

The sample frame for the initial survey of union learning representatives was unionlearn with the TUC's database of union learning representatives. This consisted of 10,713 individual union learning representatives. For the first time, separate questionnaires were developed in respect of active and inactive union learning representatives. This was done for two reasons as outlined above. In total, 1,292 union learning representatives responded to the survey. Of these 968 responses were received from active union learning representatives and 324 responses were received from inactive union learning representatives. Furthermore, 22% of responses were from union learning representatives in the North-West region of England.

2009 union learning representative survey distribution and sample

Total issued	10,713
Sample	10,672
Distribution	September 2009

	Ret. by: 7 th October 2009
Follow-up	December 2009 Ret. by: 4 th January 2010
Response	1,292
Response rate	12.1%

2009 managers' survey distribution and sample

Total issued	264
Sample	264
Distribution	February 2010 Ret. within two weeks of receipt
Response	112
Response rate	42.4%

Reflection on Questionnaire Design, Pilot, Issue and Data Analysis.

The design of each survey was dictated to a large extent by the commissioner of the research. The pilot surveys raised relevant and useful questions. Amendments as a result of relevant feedback reduced ambiguity in areas of the questionnaires, particularly in respect of the ULRs1 and ULRs2, and the final version was a rather long and complex survey. This might have discouraged union learning representatives from responding. Hence the offer of support in completing the questionnaire in the cover letter.

Reflection on the lead times needed for the design, production and issue of the questionnaires has provided valuable learning for the project management of future projects. The author is also grateful for the support of colleagues in SDS in respect of the process side of managing a survey of this size.

Learning from ULRs1 and ULRs2 was applied to the process for the 2009 national union learning representatives and their managers survey, as were the lessons learnt in respect of the lead time necessary for a response to the initial mailshot and follow-up mailshots. The effort and resources required for the follow-up mailshots for each survey were also noted.

Data analysis

Surveys

A common process was applied to the analysis of data for each of the questionnaires. A coding book was raised using the questionnaire template. Codings for qualitative variables were added as data were collected from the responses. Data were input into SPSS and

initial frequency tables were run. From analysis of the frequency tables, decisions were made as to what relationship between variables should be investigated further via bivariate analysis. Qualitative data responses were collected manually and entered into word documents for future reference. The Regional Manager (the commissioner of the research) and his team were asked what further analysis they required from the data. No specific requests were made so the author used the objectives set for the research project at the initial tendering stage and analysed the data to provide evidence towards these objectives.

Focus Groups

Analysis of the data collected from the groups was a two-stage process. Firstly, the facilitation of the groups involved an ongoing analysis of the contributions from participants. Areas of agreement and controversy emerged from the discussions. These key themes were identified and provided the focus for further exploration through discussion. Secondly, the notes from the groups were closely examined in terms of: the consistency of contribution; the frequency/extensiveness of comments; and the intensity of comments.

Interviews

The semi-structured interviews completed with TUC Learning Services staff were not formally analysed. The notes from each interview were reviewed to aid understanding of the context and nature of union learning representative activity. This knowledge and understanding has informed the project management process and the data collection tool design.

Semi-structured interviews with North-West LSC representatives were not recorded. The responses noted on the interview scripts were formalised as minutes of the meeting and forwarded to each interviewee for information and verification that they were representative of the discussion. These confirmed minutes were used to identify the key themes from these interviews and are reported in the LSC section of the North-West findings.

Participant as observer

There are no particular findings presented from this role, but experiencing this role informed the author's understanding of union learning representative activity and how it is supported by UCU. Also the author's other roles in a UCU Branch deepened her knowledge

and understanding of the context and practice of collective bargaining in a complex organisation. It also developed her understanding of the interrelationships of the local branch with regional and national full-time officers, and of the protocols, policies and procedures associated with this side of the employment relationship.

Generalizability

Generalizability is concerned with the external validity of the research. This is an issue to consider for this piece of work as whilst the union learning representative initiative is a national initiative the primary data has focussed on the activities of union learning representatives in the North West of England. Thus to what extent can it be claimed that the findings from this research are likely to be representative of union learning representatives practicing in other regions. Robson, (2011) identifies four criteria (adapted from LeCompte and Goetz, (1982) cited in Robson, *ibid*:91) as threats to generalizability. These criteria have been considered in relation to this research project as follows.

1. Selection:

Concern that the findings are specific to the group studied. The findings are specific to union learning representatives and the role descriptor (TUC, 2004) that has informed the design of data collection tools and against which findings have been compared is a national model. Thus is applicable to union learning representative activity in all of the TUC's regions not just in the North West of England.

2. Setting:

This considers if the findings are specific to, or dependant on, the particular context in which the study took place. The findings from this research are specific to union learning representative activity that occurs in the workplace. The respondents however practice as union learning representatives in a range of organisations across the North-West region of England. The profile of organisations represented is discussed in Chapter eight. In regions with an organisational (work) profile similar to that of the North West of England the findings have external validity. The findings are also reinforced as representative when compared to the findings from other concurrent national union learning representative surveys and workplace learning literature.

3. History:

The data for this research was collected between 2004 and 2009. The researcher is not aware of any specific and unique historical experiences during that time that may have determined or affected the findings. If the research project was to be repeated today

(2014) however it may be that the impact of the economic situation and the on-going cost containment activity in the public sector in England may well affect the findings.

4. Construct effects:

The constructs that have been studied are specific to the union learning representative initiative and its PSHs. Thus it is claimed that the findings are representative of union learning representative activity within England. This is comparable to other workplace learning activity as the research has confirmed common PSHs to such activity. The union learning representative role is however a specific role and such a role does not exist in all occurrences of workplace learning.

Conclusion

McGoldrick et al. (2002:3) state that the relationship between ontology and epistemology influences an individual's understanding and expression of a discipline – the discipline is, in their case and here to some extent, Human Resource Development (HRD). Ontology is concerned with the views of the researcher, whereas epistemology is dictated by the characteristics of the issues under investigation, and how the data, acknowledged as valid in that discipline, can be collected.

Since the author's epistemological position is realism, the approach chosen for this research has been deductive, which has, in turn, informed more inductive approaches. The strategies employed have been quantitative and qualitative surveys, documentary research, and 'participant as observer' involvement by the author. The author also chose mixed methods, and the time horizon of the research study was longitudinal. The realist approach of this research project has facilitated the analysis of a range of data to provide an informed response to the research question:

“To what extent is union learning representative activity meeting the expectations of its principal stakeholders?”

Chapter 7: Findings and Analysis – Local (North-West Region of England) Perspective

Introduction

This chapter reports the research findings from the local level (North-West region of England). This TUC region has been acknowledged as a key player and path finder in the initiation and establishment of the union learning initiative within England and Wales. Clough (2007:8) advises that in regions, such as the North West, TECs tended to work together to fund regional projects. Here discretionary funding and European Social Fund (ESF) money was pooled to maximise the impact of projects. Through these projects, the North-West region of England TECs contracted Bargaining for Skills (BfS) to work with specific employers and unions through projects at workplaces, to meet outcomes such as commitment to Investors in People (IiP).

As discussed in the methodology chapter, the findings are based on data collection over six phases:

- **Phase One:** Semi structured interviews with TUC Learning Services North-West Region Development Workers and Project Workers
- **Phase Two:** Union Learning Representative Survey One (referred to as S1 and ULR1); Affiliate union survey; Employer survey
- **Phase Three:** Focus group events (referred to as FG01, FG02, etc.); LSC interviews
- **Phase Four:** Union Learning Representative Survey Two (referred to as S2 and ULR2)
- **Phase Five:** Participant as observer
- **Phase Six:** 2009 National survey of Union Learning Representatives and their managers (referred to as 2009 survey)

Responses to the three union learning representative surveys (ULRS1, ULR2 , 2009 survey) have been mapped against the prescribed 2004 union learning representative role descriptor (TUC, 2004) in Table 3 below. Table 3 details which question(s), by survey, gathered data against each activity. The response rate for each question, by survey, is provided for information. For 'other items' I to IV (at the bottom of the table), these were open questions on the surveys. The question number is given for each survey. Due to the qualitative nature of these responses it is not possible to report percentage response rates but the examples given by respondents have been used to illustrate the findings.

Table 3: union learning representative role descriptor (TUC, 2004:7) plus items I-IV

(Key: qna = question not asked)

		Question No.	Response rate	Question No.	Response rate	Question No.	Response rate
Activities	2004	ULR S1	%	ULR S2	%	2009	%
1.	<i>Raising employees awareness of benefits of learning</i>	4.7	90.3	4.5 (to employer)	67.9	24	59.0 (yes) 34.4 (To an extent)
2.	<i>Providing learning advice and guidance to employees</i>	4.7 4.9	83.0 62.5	4.5 4.7	80.7 79.2	19	94.4
3.	<i>Working (with employers) [author's brackets] to identify learning needs</i>	4.7 4.12 4.13 4.15 4.16 4.17	50.1 51.7 50.1 If not, who How Addressed?	4.5 4.10 4.11 4.12 4.13	42.5% 45.6 50.2 How If not, why	19	65.1
4.	<i>Securing equal opportunities in learning</i>	4.7	29.0	qna		qna	
5.	<i>Negotiating learning agreements with employers including time off for study</i>	6.1 4.7	59.6 46.8	5.1 4.5	62.7 54.7	20 32	66.8 55.9
6.	<i>Helping employers to establish employee development schemes</i>	4.7 8.1 9.1	29.6% Open Q Open Q	4.5 8.1 9.1	20.8% Open Q Open Q	qna	
7.	<i>Establishing and running trade union learning centres</i>	6.8 7.1	47.0	5.3	51.7	32	35.1
8.	<i>Supporting innovative workplace development such as Union Learning Fund projects</i>	4.7	29.6	4.5	20.8	qna	
9.	<i>Monitoring quality of provision Progress of colleagues (always)</i>	4.21 4.22	36.2 41.9 (formal)	4.19 4.20	42.9 40.0	qna	
Other items							
I.	Levels of activity amongst the union learning representative population (North-West region)				ULR S1	ULR S2	2009
	<i>Have you been practising as union learning representative since completing training?</i>				4.8	4.24	
	<i>Why have you not had the opportunity to practise union learning representative activities?</i>				4.10	4.8	
	<i>Working with non-union colleagues</i>				4.11	4.9	
II.	<i>Barriers to your union learning representative role</i>						
	<i>Monitoring own union learning representative activity</i>				4.23	4.21	

		4.24 4.25	4.22 4.23	
III.	<i>Impact of time away from job on workplace relationships</i>		6.7	
IV.	<i>Has your union learning representative role changed (increased)?</i>		4.25	
	<i>How has your union learning representative role changed (decreased)?</i>		4.26	18

Qualitative data from the nine focus group events is too detailed to include in the main body of the thesis, these findings are located in appendix 13. A summary of the key points for each activity is provided within this chapter. The qualitative evidence is discussed in relation to the principal stakeholders (PSHs), and other factors that appear to facilitate, enhance or inhibit each of the above union learning representative activities. Analysis of the qualitative findings is related to six categories. These were identified as: government, employer, unionlearn/union, members, the scope of the union learning representative role, co-operation between PSHs, and 'other' for relevant issues that did not fit into the stated categories. Please refer to the relevant task (as per 2004 role descriptor (TUC, 2004:7) and 'other items' of Appendix 13 for the in-depth detail.

References to other concurrent publications are given where they report similar findings to this research and where they, therefore, reinforce the findings outlined in this thesis. These were national surveys rather than in-depth regional surveys. In chronological order they are:

Cowen, G. Clements, M. Cutter, J. (2000), *Union Learning Representatives Survey, (Report 1)*, York Consulting

York Consulting, (2000), *TUC Adapt/Ufi Learning Services Evaluation, Union Learning Representatives Survey, June 2000*, London, TUC

York Consulting, (2003), *TUC Learning Services Union Learning Rep Survey*, London, TUC Learning Services

York Consulting (2005), *Evaluation of the Union Learning Fund Survey of Union Learning Representatives*, London, TUC Learning Services

Unionlearn with the TUC, (2006b), *Making a real difference, union learning reps: a survey*, London, unionlearn

Bacon, N. and Hoque, K, (2008), *Opening Doors to Learning*, London, Unionlearn with the TUC.

Bacon, N. and Hoque, K. (2009), *The impact of the union learning representatives, a survey of ULRs and their employers*, London, Unionlearn with the TUC.

Bacon, N. & Hoque, K. (2010), *Union representatives and training: The impact of Union Learning Representatives and the factors influencing their effectiveness*, Human Relations, published on line 2 November 2010

Saundry, R. Hollinrake, A. and Antcliff, V. (2010), *Learning Works, Report of the 2009 survey of union learning representatives and their managers*, London, Unionlearn with the TUC

The chain of corporate governance; (Johnson and Scholes, 1997:186) Figure 1 Chapter Two, page 29, and the stakeholder mapping power/interest matrix; (Johnson and Scholes, 1997:198) Figure 2, Chapter Two, page 31, have been applied where appropriate to demonstrate the impact of the levels of PSHs' power/interest on union learning representative activity.

		Level of Interest	
		Low	High
Level of Power	Low	A	B
	High	C	D

The above unpopulated version of the power/interest matrix is provided as a key for the definition of quadrants throughout this chapter. Within the text occupancy by a PSH will be referred to as quadrant A: B: C or D where:

A = low power/low interest

B = low power/high interest

C = high power/low interest

D = high power/high interest

For union learning representative activity to take place in the workplace it has to be facilitated by the employer therefore the employers, at local level occupy either quadrant C (high power/ low interest) or quadrant D (high power/high interest) position. Likewise the local branch will occupy either quadrant C or D as it has to facilitate the union learning representative role within the branch structure. Union learning representatives are elected into the role thus they occupy quadrant D (high power/high interest) when putting themselves forward for election but then it is the branch members who occupy quadrant C

(high power/low interest) or D (high power/high interest) when actually electing their representatives.

The application of this model to the findings is summarised at the end of the chapter in Figure 5, page 226. The levels as identified in the representation of the chain of corporate governance (adapted from Johnson and Scholes, 1997:186) for the union learning representative initiative introduced in Chapter 2, have been mapped onto the matrix to demonstrate at which level and at what strength, the power and interest of each PSH is reported to be influencing union learning representative activity.

Findings from the North-West Region of England

For unionlearn with the TUC (national) and unionlearn with the North-West TUC (local), these findings represent the most extensive piece of research that has been done on union learning representatives in the North West of England. This was a North-West Development Agency (NWDA) funded project, thus the findings also served as a monitoring activity for the government and its related agencies. The project was also unionlearn with the North-West TUC's monitoring activity for the North-West of England region. The findings were reported to the NWDA, to North-West region LSCs and to the TUC/unionlearn nationally, as well as to the organisation that commissioned the research; unionlearn with the North-West TUC.

Table 4, below, details the percentage of union learning representative respondents from individual unions, for each of the three union learning representative surveys. Where the respondent response rate was less than one per cent for an individual union, these have been excluded from this stage of the analysis.

Table 4: Response rates by union

Union	% of response rate ULRS1	% of response rate ULRS2	NW region % response rate to 2009 ULRs & their Managers Survey
Amicus	16.5%	10.5%	Now Unite
BFAWU	3.3%	3.8%	1.0%
CWU	2.2%	4.6%	6.9%
GMB	11.5%	11.0%	6.9%
GPMU	1.4%	.0%	Now Unite
PCS	9.9%	20.7%	16.8%
TGWU	14.6%	16.9%	Now Unite

UNISON	23.0%	19.8%	25.5%
Unite			17.2%
USDAW	11.1 %	8.9 %	7.4 %

The subheadings for this section of the chapter, follow activities 1 to 7 and the ‘other items’ in categories I to IV, in Table 3, page 160.

1. Raising employees’ awareness of benefits of learning

(Promoting the value of learning or training (Acas, 2003))

The evidence from the three union learning representative surveys report that this is a key role for union learning representatives, with 90.3% claiming this at ULRS1; 67.9% at ULRS2 and from the North-West respondents to the 2009 survey, 59% reported that they felt their union learning representative activities had raised awareness of learning amongst colleagues, whilst a further 34.4% felt they had ‘to an extent’.

Summary

Union learning representatives perceive that raising awareness is a fundamental activity (see also: Cowen et al., 2000; York Consulting, 2003; unionlearn, 2006b). Members have to be confident about the level of knowledge their union learning representatives possess (Cowen et al., 2000:6). Also PSHs need to work in co-operation with each other to facilitate union learning representative activity (Cowen et al., 2000). Union learning representative activity can raise awareness of government initiatives. The caveat was given that if members’ awareness of learning is raised then they need to be given time to participate in learning activities (Cowen et al., 2000:5; unionlearn, 2006b:10). Union learning representatives often have to encourage members to believe in themselves and to believe that learning is for them. There were reports of a lack of employer support (unionlearn, ibid) and that espoused support from senior management was not always replicated in the everyday action of middle and junior managers who can inhibit union learning representative activity (Cowen et al., 2000). The unions recognise the value of the activity

and it is seen as another service that can be provided for members (Bacon and Hoque, 2009; Saundry et al., 2010).

2. Providing learning advice and guidance to employees

(Providing information and advice about learning and training matters (Acas, 2003))

Evidence confirms that this is a key role for union learning representatives and one which they practice as union learning representatives (Cowen et al., 2000; York Consulting, 2003; unionlearn, 2006b; Bacon and Hoque, 2008; Saundry et al., 2010). From ULRS1, 83% of respondents reported they saw this as part of their role. At ULRS2, 80.7% of respondents confirmed this was part of their role, and for the NW respondents to the 2009 survey, this was the case for 94.4%. ULRS1 and ULRS2 asked union learning representatives what most people came to them for. The top response, at 62.5% from ULRS1, was information, advice and guidance (IAG), with 79.2% ULRS2.

Summary

The quantitative data clearly evidences this is a key role for union learning representatives (see also, Cowen et al., 2000; York Consulting, 2003; unionlearn, 2006b; Bacon and Hoque, 2008; Saundry et al., 2010). For union learning representatives, the newness of the role means that typically on return to the workplace, following their initial training, there is not the same experience and support available from more experienced officers in the branch. This is different to that of other new lay officers in the more traditional roles of shop steward or health and safety representative. Also in respect of union learning representative activity there is a high ratio of members to each union learning representative (Bacon and Hoque, 2009). As with task 1, above (raising awareness), union learning representatives need to be suitably knowledgeable to offer informed and accurate IAG, and to gain the confidence of their members and their employer (Cowen et al., 2000; York Consulting, 2003). They also need their other colleagues and PSHs to appreciate the reality of the scope of the union learning representative role. Finally the methods by which a union learning representative provides IAG can be influenced by the context of the work situation and occupational sector (unionlearn, 2006b; Saundry et al., 2010).

3. Working (with employers) to identify learning needs [author's brackets]

(Analysing learning or training needs (Acas, 2003))

Data collected via the three surveys has provided a significant amount of evidence of the extent to which union learning representatives fulfil this role within organisations (Cowen et al., 2000; York Consulting, 2003; unionlearn, 2006b; Bacon and Hoque, 2008; Saundry et al., 2010). The ULRS1 and ULRS2 reported 50.1% and 42.5% respectively ‘worked with employers to identify learning needs’. When asked:

Q4.13 Have you undertaken a learning needs’ assessment at your workplace?

Of union learning representatives responding to ULRS1, 50.1% said yes and 50.2% at ULRS2.

From the 2009 survey, 65.1% of union learning representatives said they had undertaken one in the last twelve months.

Table 5: Q4.14 How have you assessed learning needs?

	ULRS1	ULRS2
Formal:		
Survey	43.8%	43.9%
Formal meetings	15.8%	16.5%
1to1 discussions with colleagues	37.0%	37.4%
Other	3.5%	2.2%
Informal:		
Ad-hoc meetings	30.2%	33.3%
In passing	66.0%	60.5%
Other	3.8%	6.1%

As table 5 above demonstrates of the union learning representatives who had completed a learning needs analysis a variety of data collection methods were being employed by union learning representatives. It is noted that formal activity is reported more or less equally as being via surveys and 1 to 1 discussions with colleagues. This might suggest that the union learning representative role has the potential to be more of a 1 to 1 nature and could add to how organisations typically identify learning needs rather than be prone to duplicate the organisation’s more formal methods.

Table 6: Q4.15 If you have not undertaken a learning needs’ assessment, who assesses learning needs within your workplace?

Who:	ULRS1	ULRS2
Training department	30.6%	88.4%
HR department	10.4%	1.0%
Managers/supervisors	30.6%	1.9%
Senior learning rep/senior steward	8.7%	1.9%
Appropriate department	5.5%	1.0%
College/training provider	10.4%	1.9%

Not known/nobody	0.0%	3.9%
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The evidence above demonstrates that the union learning representative’s role in identifying learning needs appears to be supplementary to the activity carried out by the employer. As would be expected the Training Department is reported as taking the lead role in this activity.

Table 7: Q4.17 Once identified, are learning needs addressed within your workplace?

	ULRS1	ULRS2
Always	26.3%	25%
Sometimes	63.9%	67.5%
Never	9.7%	7.5%

As table 7 above highlights union learning representatives report that only a quarter of identified learning needs are addressed, rising to two thirds sometimes being addressed. This suggests that both union learning representatives and their members and/or colleagues could become disillusioned by the lack of response to their needs analysis activity.

Summary

Appropriate and accurate identification of learning and development needs is a crucial stage of the training process (see also, Cowen et al., 2000; York Consulting, 2003; unionlearn, 2006b; Bacon and Hoque, 2008; Saundry et al., 2010). Inaccurate training or development needs’ analysis (TNA/DNA) results in the provision of ineffective learning and development interventions that, regardless of their quality or appeal to learners and do not meet the needs of the learners or their organisation. On completion of their training, it is expected that the new union learning representative will carry out a training needs’ analysis of their members on return to the workplace. Quantitative data at ULRS1 and ULRS2 demonstrates around 50% of union learning representatives reported that they had completed this task. This had increased to two thirds of the North-West respondents to the 2009 survey. ULRS1 and ULRS2 surveys suggest that the majority of union learning representative activity is via informal methods and is supplementary to the formal TNA/DNA activity completed by management and their representatives. This perhaps highlights that TNA is one activity where the legitimacy of union learning representatives to undertake this task might be challenged in some organisations (Cowen et al., 2000). Evidence suggests union learning representatives in such settings experience resistance to their activity from HRM/D colleagues (Bacon and Hoque., 2009:32). There were reports of a

lack of employer support for the activity and that espoused support from senior management was not always replicated in the everyday action of middle and junior managers. The activity was inhibited by, for example, restricting resources required for union learning representatives to complete TNA/DNA with their members. Respondent expressed their views that they experienced random interpretation of the statutory rights (unionlearn, 2006b; Saundry et al., 2008). This particular activity shifts union learning representative from a position of IAG to actually participating in the training process within organisations, thus the caveat within the statutory rights should be heeded:

“... Union Learning Representatives should liaise with their employers to ensure that their respective training activities complement one another and that the scope for duplication is minimised.”

(Acas, 2003: section 14)

The implementation of standards such as Investors in People could encourage employers to include union learning representatives in the identification of learning needs. It was claimed that a lack of employer support was demotivating for union learning representatives (Cowen et al., 2000; York Consulting, 2003; unionlearn, 2006b; Bacon and Hoque, 2008; Saundry et al., 2010). This places employers in quadrant C and union learning representatives in quadrant B of the power/interest matrix. Members are often reluctant to participate in TNA/DNA activity. This places members in quadrant C as regards their relationship with the union learning representative. Union learning representatives are often overwhelmed by the expectation that they will complete this activity (York Consulting, 2003). Thus this activity could be a fundamental issue in whether or not newly trained union learning representatives becoming active and also the retention of union learning representatives.

4. Securing equal opportunities in training

This question was only asked in ULRS1 where 29% of respondents confirmed that this was part of their union learning representative role (unionlearn, 2006b). The evidence from other data collection events were reported against five themes: issues to do with the government, employers, the union, members (occupational group) and resources.

Summary

The issues union learning representatives identified as impacting on equal opportunities in training were the lack of flexibility for members working shifts or in transitory occupations such as construction workers (Cowen et al., 2000), as well as business peaks and troughs. Difficult working environments do not facilitate learning, and employers' willingness varies in the provision of learning facilities away from the work environment. The location of the learning centre has been an issue for example where it was visible to all and sundry in the organisation as to who was in the learning centre. Joint union/employer learning agreements should ensure equal opportunities in an organisation, as should a signed Skills Pledge (Leitch, 2006a) for certain members of the workforce (Saundry et al., 2010). Where such arrangements exist would suggest the employer was occupying quadrant D of the power/interest matrix. In the employment relationship, actions speak louder than words when it comes to both sides of the employment relationship demonstrating respect towards agreements and pledges. Other equal opportunities issues related to members' IT ability and their ability to access IAG and some training opportunities. The evidence demonstrates that when it comes to securing equal opportunities for their colleagues, the inhibitors are beyond the control of the union learning representatives. This places union learning representatives in quadrant B of the power/interest matrix. The enabler to overcome these issues in the local context can be the local employer and/or the local branch. Thus both would occupy quadrant C. This provides further evidence of the need for co-operation between the PSHs in order to facilitate an environment where the union learning representative initiative in practice can meet the expectations of the PSHs. Such co-operation is only likely from PSHs who occupy quadrant D.

5. Negotiating learning agreements with employers including time off for study.

Respondents were asked if their workplace had an employer/union learning agreement rather than if they had been involved in negotiating such an agreement (ULRS1 (Q6.1), ULRS2 (Q5.1), 2009 survey (Q32) (unionlearn, 2006b)). The findings were that, at ULRS1, 59.6% confirmed their workplace had an employer/union learning agreement and, at ULRS2, this was confirmed by 62.7%. In the 2009 survey, 55.9% of North-West respondents reported that arrangements for union learning representatives were set out in formal learning agreements.

Summary

The use of the word 'agreement' suggests the necessity of co-operation across the employment relationship in the consultation and negotiation of the agreement. Where a learning agreement is negotiated it suggests that the employer occupies quadrant D of the power/interest matrix. The union at regional and/or local branch level would occupy quadrant B or D (high interest/either low or high power). Individual union learning representatives are likely to occupy quadrant B. Respondents who had successfully negotiated a learning agreement in their organisation suggested the agreement should be guidance for practice rather than regulation of the activity in the workplace. This was important to facilitate the evolving nature of the union learning representative role in the early days. The learning agreement was seen as the vehicle to inform, educate and provide clarity of procedures. Also to acknowledge the role of the union learning representative, to all members of the employment relationship (unionlearn, 2006b; Bacon and Hoque, 2008, and 2009; Saundry et al., 2010, and 2011). The union needs to support the union learning representative to ensure this agreement has parity with other agreements (unionlearn, 2006b). Senior management support needs to ensure the practice of their espoused commitment to the learning agenda, via their local line managers (unionlearn, *ibid*; Bacon and Hoque, 2008, and 2009; Saundry et al., 2010, and 2011). There can be disparity at the different levels of the chain of corporate governance (adapted from Johnson and Scholes, 1997:186) in respect of this activity.

6. Helping employers to establish employee development schemes

(Arranging learning or training (Acas, 2003))

Jointism has been referred to earlier in this thesis XREF, and was seen as an early framework for later workplace partnerships, such as the Ford EDAP scheme.

The findings from ULRS1, Q4.7 were that 29.6% of respondents reported that they supported innovative workplace development. Whilst for ULRS2, the response for this was 20.8%. From ULRS1 ten per cent of respondents reported that their greatest achievement to date was setting up specific courses requested by colleagues. A further two per cent reported that they had obtained funding from the ULF (Union Learning Fund).

Some respondents felt that there was too much management control of employee development provision. Demonstrating the employer occupying quadrant C or D (high power and either low/high interest). The level of interest could be linked to the nature of the employee(s) the development is being offered to as discussed in Chapter 3.

Other mixed experience is reported. A positive response was:

"[The]employer champions our learning through Merseylearn. We have a strong partnership and often do presentations to other outside bodies. We have overcome all the barriers to learning, together, for the benefit of the staff."

This quote demonstrates an employer occupying quadrant D.

A less positive response however:

"I am very ineffectual; I came back from my course with such hopes and ideas. All shot down by my department Training Officer, who I am supposed to work with."

These two examples are presented as evidence of the powerful impact that local employer representatives can have on the scope of the union learning representative role when they occupy quadrant C and the variation of levels of co-operation between PSHs. Resulting in the second respondent occupying quadrant B (low power/ high interest) and moving towards quadrant A (low power/low interest).

Summary

Just over a fifth of union learning representatives who responded to the surveys were helping their employer to establish employee development schemes. It is more likely that this activity would be undertaken by a more experienced union learning representative, who would be confident to engage at this level and thus occupying quadrant B of the power/interest matrix. Evidence was given of situations where co-operation between PSHs and within the employment relationship in organisations facilitated this (unionlearn, 2006b; Bacon and Hoque, 2008, and 2009; Saundry et al., 2010, and 2011). A key issue was that, once union learning representative activity had been established, proactive commitment (through co-operation between PSHs) was required to sustain the processes and procedures providing the infrastructure for union learning representative activity to continue and evolve. Thus where the employer occupies quadrant D and the union learning representative occupies quadrant B, it would be pleasing to see the power element on a continuum rather than fixed at either high or low to enable the power to flex between the employer and the union learning representative as and when required. Evidence of activity that inhibited the union learning representatives' ability to establish employee development schemes was where senior management's espoused approach was not

practised by middle and junior managers in the organisation (Cowen et al., 2000; York Consulting, 2003; unionlearn, 2006b; Bacon and Hoque, 2008, and 2009; Saundry et al., 2010, and 2011).

Examples of inhibitors were:

elitist attitudes to learning and development activity in organisations where encouragement to learn was only given to management employees.

where the resources and facility time (paid time to complete union activities) are not given to support union learning representative activity (Cowen et al., 2000; York Consulting, 2003; unionlearn, 2006b; Bacon and Hoque, 2008, and 2009; Saundry et al., 2010, and 2011).

members not given the time to learn also inhibit union learning representative activity (unionlearn, 2006b).

Thus when the employer has high power and the union learning representative has low power it inhibits the scope of the union learning representative role. Respondents reported the need for their union and other branch officers to do several things for them: to educate and lobby decision makers as to the benefits that could be gained from working with the union learning representatives; to get the learning agenda as a standing item on the key communicator/team briefing agenda (Cowen et al., 2000; York Consulting, 2003; unionlearn, 2006b); and to encourage the consideration of issues pertinent to the learning agenda in other business decision-making (Saundry et al., 2010). This suggests that union learning representatives require both their regional and local level union to occupy a high interest quadrant.

7. Establishing and running trade union learning centres

Data was gathered from ULRS1, ULRS2 and North-West union learning representatives in the 2009 survey. At ULRS1 forty-seven per cent of respondents reported that they had a learning centre as a resource for their union learning representative role. For ULRS2, there was a slight increase to 51.7% respondents reported they had a learning centre as a resource. Just over a third (35.1%) of respondents from the 2009 survey reported that there was a union learning centre on site. This suggests a decrease in the number of active learning centres over time as suggested by LSC representatives in the government-related later in this chapter.

At ULRS2, a further question was asked about employer/union learning agreements. Of the two thirds (63%) of respondents who reported that their workplace has a learning

agreement, 67% reported that the establishment of a learning centre in the workplace applied to their case and was one of the issues covered by the learning agreement. Also at ULRS2, 51% of respondents had employer/union working groups in the workplace and 47% of these working groups were involved in the management of the learning centre. These findings were confirmed at focus groups and at other union learning representative events.

Summary

The number of related learning centres appears to be declining over time. A learning centre is often an outcome from the negotiation of a joint learning agreement and is recognition of the union learning representative role and its activity. The provision of a learning centre was seen as a resource for which the union could lobby, with decision makers. It is employers who facilitate access to the resources required for a learning centre. There is evidence that employers are keener to support this when external funding is available and learning centres often fail when external funding is removed. This indicates such employers occupy quadrant C whilst national unionlearn occupy quadrant D of the power/interest matrix as custodians of the Union Learning Fund (ULF). It appears that regional unionlearn occupy quadrant B.

8. Supporting innovative workplace development such as Union Learning Fund (ULF) projects

The unionlearn website defines the ULF as follows:

“The Union Learning Fund (ULF) was established in 1998 to promote activity by trade unions in support of the objective of creating a learning society. Its primary aim is to develop the capacity of trade unions and Union Learning Representatives (union learning representatives) to work with employers, employees and learning providers to encourage greater take-up of learning in the workplace...”

(unionlearn, 2012)

Data was collected at ULRS1 and ULRS2. At ULRS1, 29.6% of respondents reported that they were supporting innovative workplace developments such as ULF projects and at ULRS2 this had fallen to 20.8% of respondents.

Summary

No further evidence of this criterion was gathered. It appears that this activity does not occur for the majority of union learning representatives, as the evidence from this research suggests supporting innovative workplace developments happens for just around one fifth of union learning representatives (Bacon and Hoque, 2008:3). In the summary of their evaluation of the UK Union Learning Fund, Wood and Moore state that:

“The existence of the ULF is important to both unions and management in terms of their support for workplace learning activity. External government funding was thought to be key to the survival and acceptance of union learning by employers and, in some cases, by union members.”

(Wood and Moore, 2005:39)

Indeed the provision of the Union Learning Fund (ULF) sees the Government occupying quadrant D. When TUC Learning Services became unionlearn in 2006, it took over the management of the ULF. Thus unionlearn at national level, occupy quadrant D too. In the unionlearn strategic plan for 2006-2009 (unionlearn,2006a:7), for the strategic objective:

“To develop strategies for the sustainability of this work [unionlearn]”

a key success indicator is:

“Effective management of ULF and regional funds with tailored support packages for unions.”

(unionlearn, 2006a:7)

This suggests unionlearn at regional level occupy either quadrant B or D, depending on the nature of the relationship between national unionlearn and regional unionlearn. These strategic objectives were cascaded to the regions and are the criteria by which unionlearn with the North-West TUC’s success was to be judged (unionlearn with the North-West TUC, 2007:3) This was translated in the North West to the launch of a regional Learning and Skills for All Fund that for 2007/08 led to fourteen unions bidding for funds, resulting in twenty-four projects running for six months (unionlearn with the North-West TUC, 2008:4). This was a developing activity for unions and their union learning representatives to be involved in but the management of such projects would appear to necessitate a further skill set for union learning representatives and their union colleagues involved in managing such projects.

9. Monitoring quality of provision, and progress of colleagues

(incorporating monitoring of own union learning representative activity)

One of the fundamental differences between union learning representatives and other trade union lay officers is that the LSC required evidence of union learning representative activity in order to monitor the impact of national ULF funding at the regional level. Thus the LSC at both national and regional levels occupy quadrant D. TUC Learning Services provided evidence of the number of union learning representatives trained, and then Project Workers had responsibility for gathering evidence from union learning representatives as regards the type of activities they were involved in and monitoring the progress of colleagues on any training programmes the union learning representative had had a role in facilitating. Thus regional TUC Learning Services occupy quadrant B, whilst it is claimed here that this places the individual union learning representative in either quadrant D or quadrant C of the power/interest matrix. Data collection in respect of this activity took place at ULRS1 and ULRS2.

There was an increasing expectation for unionlearn with the North-West TUC to gather and report on evidence of outcomes of union learning representative activity. This refers to union learning representatives recording and reporting activities. Frequencies for response at ULRS1 and ULRS2 are very similar, with around 50% of union learning representatives always keeping records of contacts with colleagues, just over 30% sometimes keeping records of contact with colleagues and almost 20% never keeping records of contacts with colleagues. The format of these records tended to be paper based at just over 30%, whilst just over a quarter kept electronic records; from ULRS2 just 16% reported that they kept both electronic and hard copy of contacts with colleagues.

There was an increase from 36% at ULRS1 to 43% at ULRS2 of union learning representatives who reported they always monitored the progress of colleagues. A static third sometimes monitored progress, and just over a quarter never monitored the progress of colleagues. The methods applied were consistent across ULRS1 and ULRS2 with over 50% being via informal discussion and 36% by formal debrief and/or filling in a form.

When asked if they had to provide reports on union learning representative activity responses were as shown in table 8 below:

Table 8: union learning representatives providing reports

	ULRS1	ULRS2
Yes	40%	43%
No	60%	57%
Total	100%	100%

From this research, at ULRS2, 12% of respondents reported their activity to a TUC Project Worker, and 19% reported their activities to a Project Worker from their own union. Where such a role exists in a union's structure (e.g. PCS, Unison, Unite, USDAW), it was often these union Project Workers who provided reports on their union learning representatives' activity to unionlearn with the North-West TUC. There was a slight increase across ULRS1 and ULRS2 of respondents who provided reports. At ULRS1 almost a third of these reports were to the branch, at ULRS2 this had risen to 48%. At ULRS2, 52% reported union learning representative activities to relevant meeting/working groups, this was an increase from 13% at ULRS1. Of those reporting activities, at ULRS1, 22% reported to training/HR department and at ULRS2 this was 28%. Reporting to managers was 15% at ULRS1 and 30% at ULRS2. The format of these reports varied. From ULRS1 to ULRS2, formal, written reports had fallen from 28% to 18%, and formal emails had risen from 6% to 11%. Report forms that were referred to at ULRS1 were not referred to at ULRS2. The majority of informal reporting at ULRS2 was 53% by email and 31% via presentations. It appears therefore that reporting was rather ad hoc and that there had been little consistency across the region of how and where union learning representative activity was formally reported.

It was suggested that there needs to be an accurate and transparent register of union learning representatives to be able to demonstrate actual density of activity (this came from focus group 4, FG04). This however was the only reference made to monitoring of their activity at focus groups and other union learning representative events.

Summary

The quantitative evidence suggests up to eighty per cent of union learning representatives keep records of their contact with colleagues. It also appears that the union learning representatives and other union officials who attended focus groups and other union learning representative events were not finding the recording of their contact with colleagues an onerous activity. The PSH expectation was for the union learning

representatives to 'monitor the quality of provision, progress of colleagues'. This suggests the expectation of a formal approach to such monitoring activity. As evidenced above, it would appear that less than half of union learning representatives were engaged in formal monitoring activity. Of those that were, the format and audience for these reports vary across the region. This explains some of the comments made by the LSC as to the variable quality and nature of the evidence of union learning representative activity provided to them across the region. As regards this activity the high power lies at the local level with the individual union learning representatives and the local branch. The Government, national and regional unionlearn, regional union occupy quadrant B. With the local branch occupying either quadrant A or quadrant B of the power/interest matrix. Overall it is claimed here that this places the individual union learning representative in either quadrant D or quadrant C as the other PSHs are dependent on individual representatives providing monitoring data.

The next section of this chapter reports on the findings from the 'other items' categories I to IV, as detailed towards the bottom of Table 3, page 160. These were open questions on the surveys. The qualitative nature of the responses meant it was not possible to report quantitative response rates but the examples given by respondents have been used to illustrate the findings. The qualitative evidence is discussed in appendix 13 and related to the principal stakeholders (PSHs) and other factors that appear to facilitate, enhance or inhibit each of the above union learning representative activities.

I. Levels of activity amongst the union learning representative population

In considering the extent to which union learning representative activity has met the expectations of the initiative's PSHs, perhaps one of the most fundamental issues is the extent to which union learning representatives have practised their role since completing their training.

i. Have you been practising as a union learning representative since completing your training?

Data at ULRS1 and at ULRS2. The responses were cross tabulated with the data for respondents' length of time serving as a union learning representative. The findings presented in table 8 below. This revealed that in the first two years of the union learning representative role there was a considerable element of inactivity: 48% and 43% respectively in the first year, reducing to 24% and 32% in the second year, but if a union

learning representative continues in role beyond three years then the level of inactivity decreases dramatically to 13% and 16% respectively.

Table 9: Practice as union learning representative since completing training.

Have you been practising as a union learning representative since completing your initial training?		How long have you served as a union learning representative?		
		Less than 1 year	1-2 years	3-6 years
ULRS1	Yes	52%	76.5%	87%
	No	48%	23.5%	13%
	Total	100%	100%	100%
ULRS2	Yes	57%	68%	84%
	No	43%	32%	16%
	Total	100%	100%	100%

Two thirds of union learning representatives reported that also having other union roles, data was analysed to identify the impact of holding ‘other union roles’ on whether or not the union learning representative had been practising since completing their initial training. There was no impact from having had or not had previous union roles, see Table 10, below.

Table 10: Practice as union learning representative since initial training – no previous union role

Have you been practising as a union learning representative since completing your initial training?		How long have you served as a union learning representative?		
		Less than 1 year	1-2 years	3-6 years
ULRS1	Yes	52%	76.5%	87%
	No	48%	23.5%	13%
	Total	100%	100%	100%
ULRS2	Yes	57%	68%	84%
	No	43%	32%	16%
	Total	100%	100%	100%

There was little impact from currently having or not having other union roles, see Table 11. This has to be considered in respect of how facilities time is allocated. It would be expected that a union learning representative with a current union role will already have a facilities time allocation. Typically how they allocate that to the different roles will vary according to their priorities at any given time. The allocation of facilities time to a branch puts employers occupying quadrant D. The allocation of facilities time to individual branch officers is usually the gift of the Branch Secretary. This also places the Branch Secretary occupying quadrant D. The individual branch officer typically occupies quadrant B.

Table 11: Practice as union learning representative since initial training – other union roles

Have you been practising as a union learning representative since completing your initial training?		Previous union role	
		No previous union role/no response	Had previous union role
ULRS1	Yes	69%	68%
	No	31%	32%
	Total	100%	100%
ULRS2	Yes	71%	76%
	No	29%	24%
	Total	100%	100%

ii. **Reasons for ceasing union learning representative activity:**

With the final mailshot for both surveys, a proforma was enclosed to ask why people were no longer union learning representatives. Thirty responses were received at ULRS1, forty at ULRS2. The following tables provide the detail.

Table 12: Reasons for ceasing union learning representative activity

Reason	ULRS1	ULRS2
Redundancy/ill health/retirement	52%	25%
Change of job	23%	10%
Resigned	10%	17.5%
Never actually commenced role	7%	8%
Lack of interest in workplace	7%	15%
Too much work with other union roles	3%	2.5%
Increased workload/change of shift pattern		12.5%
Other	13%	10%

N.B. Where the total is over 100%, more than one response was given.

For the respondents who had ceased union learning representative activity, the length of time in the union learning representative role is detailed in Table 13, below.

Table 13: Ceased union learning representative activity – time in role

Time in role	ULRS1	ULRS2
Less than 1 year	13%	17.5%
1-2 years	43%	40%
3-6 years	10%	5%
Not given	33%	37.5%

Due to the limited evidence, these findings are not presented as being statistically relevant but just an indication of why union learning representatives might cease activity and why the majority serve for 1-2 years before ceasing their activity. These figures cannot be

compared to the inactive statistics as the ceased activity respondents had not responded to the main surveys.

Additional inhibitors to union learning representative activity

A challenge impeding the TNA/DNA activity of union learning representatives was the ratio of members to individual union learning representatives. Some individual union learning representatives were representing 100+ members in large organisations. The knock-on effect of representing so many members is that more resources are needed to complete TNA/DNA interviews/discussions with colleagues, to collate the information gathered and to take action in response to the findings (FG01).

As found in the second focus group (FG02), some union learning representatives reported that, following their initial training, they did not know what they were supposed to be doing on return to work. Their confidence on return to work was dependent on the course, the tutor and peers attending the course. An example of good practice had been union learning representative linking up with union learning representatives from another union. Union learning representatives emphasised that they need to be clear in respect of the scope of the role and what they can offer to colleagues (FG02).

A union learning representative who worked off-shore reported that their employer was anti-trade union and the union learning representative felt isolated in what he was trying to achieve within the role (union learning representative event September 2005). In this example the employer clearly occupies quadrant C. Employers who 'nod' but then do not put anything into action are not encouraging a new union learning representative to be active. At this meeting a fear expressed for the union learning representative role was that union officials are seen as 'bogey men' by management and therefore management tended to view union learning representatives in same way (FG06).

Summary

The evidence reported above provides insight as to the nature and level of union learning representative activity within the region. If this pattern is repeated across other unionlearn with the TUC regions, then, out of 22,000 plus trained union learning representatives, the majority of activity that meets the expectation of the PSHs is being completed by a minority of the trained union learning representatives. In addition, it appears that the first year of

the union learning representative's role are where union learning representatives are most likely to be inactive and it is within the first two years of a union learning representative's role, particularly between year one and year two, where they are most likely to cease activity.

II. Barriers to your union learning representative role

Barriers are likely to impact on the extent to which the union learning representative initiative is able to meet the expectations of its PSHs. At ULRS1 and ULRS2 respondents were asked to identify barriers that inhibited their opportunity to practise. The responses are grouped under the PSH that appears to be creating or contributing to the creation of this barrier.

Employer

There was a significant increase from 20% at ULRS1 to 44% at ULRS2, of situations where union learning representatives reported a lack of support from the employer/organisation for their role. A slight increase from 21% at ULRS1 to 23% at ULRS2 said they were not being given enough time by the employer for their activity. A more dramatic increase, from 3% at ULRS1 to 18% at ULRS2, reported that they were not given any time at all by their employer. This increase is despite the introduction of statutory rights in April 2003. In these situations, the local employer is clearly occupying quadrant C.

Unionlearn/union

Some union learning representatives reported a lack of support from their union, 2% at ULRS1 and 15% at ULRS2. At ULRS2 9% reported a lack of support from their own branch. This suggests that in some cases the local union occupies quadrant C in respect of this activity. For some respondents there was a perception that evidence of was higher up the union hierarchy than branch level (1% and 6%). Evidence that intra-relationship in unions can be similar to that in work organisations, as discussed in Chapter three (Rainbird, 2002). It is noted that at ULRS2, four per cent of respondents reported a lack of support from the TUC.

Members

At ULRS2 almost a third (31%) reported a lack of demand for activity from their members. A lack of support and/or no interest from members was claimed by six per cent of respondents at ULRS1 whilst this rose to 28% at ULRS2. In considering why there should be a fourfold increase in the reporting of this occurrence, the percentage rate responses for each union have been considered. The highest percentage of responses were from members of the PCS union, where the response rate for this question was 9.9% at ULRS1 rising to 20.7% at ULRS2. Thus the occupational sector might have an impact on members' level of interest and/or willingness to participate in activity. This has to be considered in light of the membership profile of respondents to ULRS2 where a fifth of all responses were from PCS. Nonetheless it does demonstrate that members can occupy quadrant C as regards the union learning representative being able to practice their role in any significant way.

Scope of union learning representative role

From the surveys, 29% (ULRS1) and 13% (ULRS2) of union learning representatives reported their barrier to activity was that they had just completed their training. Furthermore, 2% and 13%, respectively, commented that they were not sure what to do and 1% and 13% felt they did not have enough training and/or knowledge to practise. This places TU Education (part of unionlearn) in quadrant C. It suggests that the design and delivery of the training programme does not represent the reality of the union learning representative role. Indeed, maybe the initial training needs analysis that the design was based on was flawed.

Other

From the two surveys, 2% (ULRS1) and 14% (ULRS2) reported financial restraints as their barrier, and at ULRS2 3% had moved premises and this had created a barrier to union learning representative activity.

Summary

As the evidence demonstrates, union learning representatives are dependent on the support of their employer and the provision of time to enable them to practise their activity. Likewise they are dependent on demand and buy-in from their members, to engage with and participate in the outputs from their activity. Almost a third reported a

lack of demand for union learning representative activity from their members. A minority reported a lack of support from their union. The evidence suggests that espoused support from higher levels of the union hierarchy is not always put into practice at branch level. This is reminiscent of one of the key issues union learning representatives report from management representatives in the workplace. Thus it is claimed here that these local PSHs occupy quadrant C in respect of the initiative. Finally, as has been reported under other activities, some union learning representatives felt overwhelmed and/or under-prepared for the expectations of the role. Thus they occupy quadrant B on completion of their training but this could ultimately result in the union learning representative occupying quadrant A.

Impact of time away from job on workplace relationships

Time to fulfil the role was an issue for a number of respondents and time for members to participate in learning and training opportunities has been an issue raised during the data collection activity. In ULRS2 Q6.7 union learning representatives were asked what impact time away from their job on their activity had on their relationship with their line manager, their relationship with their colleagues and on them as individuals. The following provide a flavour of the responses:

Table 14: Examples of impact on relationship with line manager

Positive	Negative	Neutral
Good	Has to cover my role	OK
Fair at moment but would like employee (me) to be working	Dodgy but understood	Not affected
Excellent	Strained, no idea what union learning representative, TU, Skills for Life are about	Doesn't say much
Very supportive	Can be short-sighted re: my union learning representative role	Moans, but lets me go
General understanding	On the whole fine but occasionally sarcastic comments which make me feel guilty	Very little
As long as knows where I am, no problems	Time away on union learning representative duty has impact on team statistics	They do not seem interested

Has improved as I have brought new skills into my job	I am left out of meetings, updates, etc.	Working on it!
Supportive of my role	Information starvation	Depends
She is also a union learning representative	Reluctant to give me time off due to my workload	None, fits in with diary commitments

As the comments reported in table 14 above demonstrate they experience a range of responses from their line manager when they practice their right to paid time to practice as a union learning representative. One can imagine that it requires some strength of character from the individual to deal with negative response from their line manager. Likewise in table 15 below are examples of responses they get from colleagues when taking paid time to practice as a union learning representative.

Table 15: Examples of the impact on relationship with colleagues

Positive	Negative	Neutral
Benefit	No support	Little
Beneficial?	'Winds' them up	None
Better service from myself	Not sure but know difficulties are there	OK
Hopefully to help them	Extra pressure to cover	Colleagues accept this
Always arouses interest in learning	Leaves them to fill gaps in production	None yet as my work is left uncovered
Good, when we ran a course	More work for them	Allows them access to their union learning representative, but only in their own time
Supportive	Not so good	Don't know
They are confident in me	Suffer as we as a team still have targets to meet	
Opportunities for increasing skills and knowledge	Think I am on a 'jolly'	

Not surprisingly union learning representatives report that the positive response to them practicing their activity contributes to them feeling positive about their role but the negative responses have a negative impact on how they feel about their role, and how it impacts on their work activity. Thus both employers and members with positive attitudes appear to occupy quadrant D whilst those with a negative attitude appear to occupy quadrant C. Table 16 below provides examples of the impact of these attitudes on union learning representatives.

Table 16: Examples of the impact on the union learning representative

Positives	Negatives	Neutral
Satisfaction	Alienates me from my manager and colleagues	None
More support to meet the needs of the 2 jobs as union learning representative and convenor	Big impact due to minimum numbers on section	Unknown as yet
I enjoy doing something different that stimulates my mind	Difficult as work three days	Very little
Greater knowledge and understanding keeps me up to date	Extra pressure to complete daily tasks	Less time to do my job but I learn new things
Time and access to talk to colleagues	Other jobs and duties are missed	Not yet had cause to take time apart from my own course
Better knowledge of my duties	I am disappointed I have done so little	None, not recognised as union learning representative
Good	Lack of knowledge of work-related issues	None, fits in with diary commitments
Makes me feel that I am valued as a union learning representative	I feel guilty if there is a lot of work	Currently seconded so theoretically none
Less personal time required	Minimum at moment due to other roles	Minimal, can always make up any work
I can give more knowledge to my colleagues	Knowledge that colleagues are put under stress to cope without me	If needed for union learning representative duties, it's fine

Summary

From the union learning representative perspective, another finding was, of the 139 who said their employer was adhering to the statutory rights, 18% reported that on return from union learning representative duties they had to make their work up as they were still expected to deal with their normal workload allocation (Saundry et al., 2010). This does not appear to be within the spirit of the statutory rights. The evidence presented demonstrates that the union learning representative experience can be very different in different situations and, whilst statutory rights are acknowledged and supported, in many cases considerable numbers of respondents experience hostility, negative attitudes and a lack of understanding of their role when attempting to apply their statutory rights to facilitate activity within the workplace. A further example of local employers occupying quadrant B

and the union learning representative occupying quadrant B but with the potential to move to quadrant A of the power/interest matrix if they do not have facility time for their activity.

III. How has your union learning representative role changed?

At ULRS2 I asked if the nature of their role had changed over time, 50% said 'yes' it had, and consequently, 50% reported 'no' it had not. Respondents were asked if their activity had increased, decreased or if there had been some other change. Representative examples from the findings are: 69% reported that their union learning representative activity had increased; 22% reported that their role had decreased. The issues linked to a decrease in activities are in line with those presented in the section above on barriers to activity. A further 9% reported other changes in the role.

Summary

Where the union learning representative role had increased, this had been supported and facilitated by the employer. There was evidence that these respondents were able to support and contribute to the achievement of other business objectives. The evolving union learning representative role provides personal and professional development opportunities for the individuals. In some instances the development of the union learning representative into training process related activity was overcoming some of the earlier conflict with HRM/D colleagues. Likewise once members' interest is gained there is the likelihood that they will want to engage in more learning and training opportunities. Members then cascade the message, raising awareness of learning and training opportunities with other colleagues. In times of major organisational change such as redundancy programmes, respondents had been able to support members through these challenging times. There was evidence of the role creating its own niche in the branch structure with the creation of a lead union learning representative role. There was also evidence of activity encouraging organising activity within organisations. Thus demonstrating the positive impact, on union learning representative activity, that occurs when local PSHs (employer, members, branch) occupy quadrant D. There was, however, a caveat given that as the role evolves, as in other situations, the related administration role can take the union learning representative away from the type of IAG activity they wanted to practise originally.

Where union learning representatives reported that their role had decreased, the reasons for this ranged from a lack of support in the workplace from their employer but also on

occasion from their union and the branch structure and other lay officers within the branch. The ratio of union learning representatives to members can also inhibit activity (Bacon and Hoque, 2008). The same was to be found in workplaces where there was little consideration of employees' training and learning needs by the employer and no employer interest in non-job-related provision. The lack of a learning agreement often results in non-allocation of facility time for the union learning representative. There was however a positive example given, where the union learning representative had ceased voluntary activity because the role had now become their full-time job. Respondents reported that their members wanted to participate in training and learning in paid time, particularly where the member perceived that the training is job related. Where this was not facilitated, when funding for paid-time training is not available, then understandably members lacked interest and did not engage with union learning representative activity. An example was given where members had completed all the training they wanted to, thus their interest in union learning representative activity ceased. Thus demonstrating the negative impact, on activity, that occurs when local PSHs (employer, and branch) occupy quadrant C. As regards members as PSHs, even if they initially occupy quadrant B the low interest of the employer and branch can see them shift to occupy quadrant A of the power/interest matrix.

Affiliate Unions

The aim of the affiliate survey was to identify the level and extent of union learning representative activity within individual unions, in the North-West region of England. It should be noted that affiliates were surveyed only twelve months after the statutory rights for union learning representatives came into practice. Questionnaires were issued to 61 affiliate unions with 18 returns, providing a response rate of 29.5%, however three of those returned contained nil responses apart from contact details and identified that they did not recognise union learning representative activity within their union/staff association.

Name of Union	Recognise union learning representative activity
Amicus	Yes
Association of University Teachers (AUT)	Yes
British Airline Pilots Association (BALPA)	No
Britannia Staff Union	Yes
British Orthoptic Society	Yes
Chartered Society of Physiotherapy	No
Diageo Staff Association	No
GMB Lancashire Union	Yes
Graphical Paper Media Union (now Amicus)	Yes
ISTC	Yes
NASUWT	Yes
National Union of Teachers (NUT)	Yes
Prison Officers Association (POA)	Yes
Public and Commercial Services Union (PCS)	Yes
RTM	Yes
Transport and General Workers Union (TGWU)	Yes
Unison	Yes
United Road Transport Union	Yes

Union learning representative respondents to ULRS1 and ULRS2 within affiliate unions

The following table details response rates per union at ULRS1 and ULRS2 that represent more than 1% of respondents.

Table 17: Affiliate Unions

Union	ULRS1	ULRS2
AMICUS	18%	11%
BFAWU	3%	4%
CWU	2%	5%
GMB	12%	11%
PCS	10%	21%
RCN	1%	1%
TGWU	15%	17%
UCATT	1%	1%

UNISON	23%	20%
USDAW	11%	9%

Responses were received from union learning representatives representing other unions but at ULRS1 and ULRS2 each was less than 0.5% of responses. As detailed in the table above, union learning representatives from six unions each provided 10% and more of the responses, therefore analysis of affiliate unions as stakeholders will consider the six unions detailed below in table 18. These unions represent 89% of union learning representatives who responded at ULRS1 and 89% at ULRS2, response rates per union varied.

Table 18: Response rates

Union	ULRS1	ULRS2
UNISON	23%	20%
AMICUS	18%	11%
TGWU	15%	17%
GMB	12%	11%
USDAW	11%	9%
PCS	10%	21%

Since the data collection for this research was carried out, Amicus and the TGWU have merged to form Unite. Unite is Britain's biggest union with 1.5 million members, working in every type of workplace (Unite the union, 2008 accessed July 2014).

Identifying the union learning representative role

A shortcoming of the affiliate survey is that it did not ask a direct question of affiliate unions as to why they had decided to recognise the union learning representative role within their union structure. Overall there was consistency across the affiliate unions as to the term used for union learning representatives, with the majority of unions using the term 'union learning representatives', the only other term reported was 'Advocate Workers for Learning'.

Identifying resistance

A point of interest was to find out if unions regarded union learning representative activity as a core activity: seventeen replied 'yes' but three unions replied 'no' with six responses stating 'don't know'. However, the majority of unions report that union learning representative issues are discussed at national and regional level. Also, union learning representative issues were considered by 14 unions at branch level, although only four

unions reported 'union learning representative activity' as a standing item on the branch agenda.

Allocating responsibility

Affiliates were asked how union learning representative activity was acknowledged within the union's structure. At the time of this survey, seven unions reported that there was formal recognition of the role in their union rule book. Other responses referred to a combination of the activity being assigned to a specific national officer, regional officer or branch officer. As regards the role title of the individuals with responsibility for such areas of work as the Learning and Skills Agenda, union learning representative policy, union learning representative activity, and the Learning Strategy, there was little consistency. Those responsible included: the National Executive Committee, Assistant General Secretary, Project Manager/Worker, Education Officer, Learning Organiser, Lifelong Learning (Project) Co-ordinator, Recruitment, Campaigns and Organisation, and Director of Organising and Learning Services. This confirms the power of affiliate unions as to the decision to support union learning representative activity or not. Also the allocation of resources indicates a level of interest from this regional level PSH. Thus where these two criteria are evident the affiliate unions occupy quadrant C or even quadrant D of the power/interest matrix.

Implementing strategies

Affiliate unions were asked if they required union learning representatives to have held other union officer responsibilities, one union reported that it did. As regards which union officer roles respondents felt qualified individuals as union learning representatives, responses covered the range of traditional roles from shop steward to branch officer. Although six unions replied that none of the other officer roles qualified individuals as union learning representatives. The appointment of union learning representatives by unions tended to be by nomination or the individuals volunteered an indication of high power for the individual as to whether or not they get involved in the initiative. Ten of the unions that responded advised that their union learning representatives were elected. The majority of respondents reported that their union learning representatives received training for the role, mostly of five days duration and provided by TU Education. However seven unions stated that they provide their own initial training. All respondents were either 'satisfied' or 'very satisfied' with the initial training provision. As regards further development courses that union learning representatives attend, unions' identification of

these correlated with that of respondents to ULRS1 and ULRS2. Provision of further development courses for union learning representatives were in eleven cases by the union and by TU Education in five cases. This is a trend that correlates with findings from ULRS2. The majority of unions were satisfied with this training and four unions reported they were 'very satisfied'. Affiliate unions were asked what other development courses they would welcome for union learning representatives. Suggestions were:

- Time/Diary Management
- City & Guilds 929/5 (Certificate in Adult Learning Support)
- FENTO level 2 & 3 (Further Education National Training Organisation, responsible for national standards for teaching and supporting learning in further education in England and Wales)
- Union structure and organisation (TU Education has addressed this need in initial union learning representative training since the affiliate survey was completed)
- Funding Sources (knowledge and understanding of funding sources is sought by many of those involved in delivering the agenda)
- Project Management Training

At this stage of the initiative, unionlearn and those affiliate unions organising their own development programmes for new union learning representatives occupy quadrant D. This also places them in a powerful position as regards the content of these development programmes. This power would be present at the national level.

Union learning representative capacity

Five of the unions that responded reported that union learning representatives were first appointed in 1998, two said they were appointed in 2001, two in 2002, two in 2003 and one in 2004. Five unions did not respond to this question. Suggesting that although union learning representatives have been in place since 1998, for many unions this was still a very new activity. Thus it requires support until it is embedded in their structure and procedures and is able to sustain itself. Table 18 below demonstrates a stark variance in the number of union learning representatives per union and then within the North - West region of England at this early stage of the initiative.

Table 19: Total number of union learning representatives in union as at 31st December 2003

(to correlate with TUC Learning Services accessed for ULRS1 distribution)

Number of union learning representatives in Union	Frequency
4	1
56	1
135	1
400	1
640	1
700	1
1500	1
No response	8
Number of union learning representatives in North-West Region	Frequency
0	1
2	2
10	1
14	1
70	1
140	2
180	1
200	2
215	1
500	1
No response	5

Thus at this stage of the initiative affiliate unions appear to occupy quadrant D if their union buys into the initiative. Those who appear to have not bought into the initiative occupy quadrant C. This could present the affiliate unions as having the same choice as the employers. Likewise table 19 below demonstrates a stark variance in the affiliate unions' aims for their union learning representative to membership ratio. This suggests that each union would have different expectations for what their union learning representatives could achieve based on the number of members they were representing.

Table 20: Unions aim for ratio of union learning representatives to membership

Unions aim for ratio of union learning representatives to membership	Frequency
1:50	3
1:100	1
1:150	1
1:250	1
1:500	1
1 per branch	1
Variable	1
No response	6
Target Dates	Frequency
2005	2
2008	1
2006	1
2010	1
No response	9

So certainly at this stage of the initiative the power and level of interest of affiliate unions is evidenced by the variations in the projections of ratios of union learning representatives to members in the future.

Thirteen unions stated that they had a database of union learning representatives within the North-West region, and two unions did not have a regional database. Ten unions had a national database of union learning representatives, four unions did not. These findings from the affiliate survey are interesting when considered in the light of the national target for 22,000 trained union learning representatives by 2010 and, most importantly, when reflecting on the experiences reported by union learning representatives who often have responsibility for 100+ members as well as other union officer roles in the workplace. For one of the unions that reported they wanted to achieve a 1:50 ratio by 2010, at the time of the survey they had 200 trained union learning representatives and to achieve this target they required 2,000 trained union learning representatives. This illustrates the massive investment of resources required by this quadrant D union, in enrolling and training union learning representatives to meet their own national target.

Support for union learning representative activity

The affiliate survey was issued twelve months after statutory rights for union learning representative activity and training came into practice. All unions that responded reported that their union learning representatives get paid time to fulfil union learning representative activities, the amount of paid time reported is given in table 21 below.

Table 21: Paid time for union learning representative activity

Average hours paid time per month	Frequency
1 hour	1
3-4 hours	1
4 hours	2
16.9 hours	3
17 hours	1
Varied	3
On demand	2
Not calculated	1
Patchy/Negotiations	1
No response	5
Not applicable	2

In respect of union learning representatives receiving unpaid time for their activity, 13 unions responded ‘yes’, ten ‘no’, and three did not respond to this question. The amount of unpaid time is illustrated in table 22 below.

Table 22: Unpaid time given to union learning representative activity

Average hours unpaid time per month	Frequency
1 hour	1
5-6 hours	2
7-8 hours	1
9-10 hours	1
11-12 hours	1
unknown	2
No response	11
Not applicable	4

The evidence presents limited consistency amongst the affiliate union respondents. As regards facility time regional level, union officers occupy quadrant B as employers are the PSH with the power to allocate facility time to the branch. The Branch Secretary or similar will occupy quadrant D of the power/interest matrix as regards the distribution of facility time to the roles within the branch. What is unknown is which quadrant Branch Secretaries

occupy as regards the introduction and development of the union learning representative role within the branch structure.

Procedures that support the union learning representative role

Twelve unions reported that there was a formal structure in place to support union learning representatives at national level, ten reported there was one at regional level and seven at branch level. In respect of delegated responsibility for union learning representatives at national and regional level, nine reported 'yes', and seven reported this at branch level. This illustrates the initiation at national level and then it being cascaded through regional level to local level for implementation.

Union learning representatives value forums and networks to support and inform their activity. At the time of the affiliate survey, eight unions held forums at national level, the majority of these were annual events. Ten unions held forums at regional level, again reporting that the majority were annual events. Six unions held forums at branch level, and the frequency of these tended to be monthly, although three unions reported 'variable' or 'other' frequency. There was generally a 50:50 split across respondents as to whether or not they produced other forms of communication, such as newsletters for their union learning representatives at national, regional and branch level. If union learning representatives are registered on the unionlearn with the North-West TUC database, they do receive unionlearn publications, briefing notes and so on. This places the affiliate unions in quadrant D in facilitating support networks for union learning representatives and union learning representatives in quadrant B of the power/interest matrix as regards the level of support available to them in the local area.

Further support for union learning representatives was provided by the unions' own and/or unionlearn Project Workers. Thirteen unions reported that their union learning representatives worked with a union Project Worker, eight reported that they worked with a unionlearn Project Worker. As regards their level of satisfaction in respect of accessibility to union Project Workers, ten were either satisfied or very satisfied, and two reported that they were dissatisfied with the access available. For access to unionlearn Project Workers, nine were either satisfied or very satisfied, and two reported that they were dissatisfied with the access available. Given a fifth of those who responded to these questions are dissatisfied, further investigation as to the reasons for this would be useful. What is not available from this data is an idea of the ratio of Project Workers to union learning

representatives/workplaces. From this it is claimed that unionlearn occupy quadrant D in the provision of regional level project workers to work with local level union learning representatives. It is anticipated that the IAG provided to local union learning representatives by regional project workers would be more consistent, as would the identification of local level example of best practice and barriers to activity and this would be reported back to regional level.

The affiliate union responses in identifying the barriers that inhibit the union learning representative role were compared to the responses given by respondents in the three surveys. The table below illustrates the findings.

Table 23: Barriers that inhibit the union learning representative role

	Union (%)	ULRS1 (%)	ULRS2 (%)	2009 (%)
Lack of time	43.0	63.5	65.4	61.5
Lack of office space	35.0	28.3	25.0	20.0
Lack of employer/union learning representative agreement	35.0	33.9	29.3	29.8
Lack of administrative support	30.0	23.3	21.3	?
Lack of computer access for email /internet	30.0	23.8	26.6	?
Lack of telephone access	22.0	13.0	14.4	?
Lack of resources	22.0	27.6	25.5	?
Lack of committee	17.0	21.3	19.7	37.2
Lack of networking opportunity	17.0	25.3	22.9	19.1
Lack of learning resources	13.0	21.7	18.6	?
Lack of a learning centre	13.0	30	27.1	56.2
Lack of informal arrangements	13.0	22.9	18.6	?
Lack of expertise/experience	9.0	31.1	39.3	28.2
Lack of official time off work	9.0	3.4	18.2	32.7
Lack of access to unionlearn Project Worker	4.0	12.8	16.0	26.3
Lack of access to union support	4.0	2.4	15.3	22.1

NB: % of cases adds up to more than 100 because respondents gave more than one answer.

Where '?' is entered, it is due to a corresponding response not being available from that data collection activity.

Overall the barriers that inhibit the union learning representative role as identified by the affiliate unions reflect the barriers identified by union learning representatives. These issues, as discussed earlier, place the local employer occupying quadrant C. The occurrence of such barriers however is often underestimated by the affiliate unions. The key discrepancies, where the affiliates' perception of barriers is minus 10% or more than that

reported by union learning representatives are in respect of: time, administrative support, learning centre, informal arrangements, expertise/experience, official time off work (facility time), access to a unionlearn Project Worker and access to union support. Where the affiliates' perception of barriers is 10% or more greater than that reported by union learning representatives is in respect of a lack of telephone access only. Thus, overall, the affiliate unions underestimated the barriers faced by their union learning representatives in the workplace. From this it is proposed that affiliate unions occupy quadrant A as regards the barriers that inhibit their union learning representatives' activity.

The affiliates were asked to identify the activities their union learning representatives were involved in. Following on from the discrepancies in affiliates' perceptions of the barriers their union learning representatives face compared to the reality, the next stage of this analysis compares the findings from the three union learning representative surveys to the affiliates' opinion about what union learning representative activity entails. The outcomes are illustrated in table 23 below.

Table 24: Comparison of affiliate unions' perception of union learning representative activity to union learning representative report of activity

	Union (%)	ULRS1 (%)	ULRS2 (%)	2009 (%)
Promoting the value of learning	61	90.3	67.9	59+34.4
Offering advice and guidance on learning	61	83	80.7	94.4
Getting information on learning opportunities	65	42.9	43.9	94.4
Negotiating learning with the employer	48	46.8	54.7	66.8
Negotiating access to college courses	52	?	?	?
Helping colleagues to get funds for learning	35	34.1	27.4	52.6
Developing learning resources on site	43	?	?	?
Learndirect	4	?	?	?
Different activities depending on local structures	4	29.6	20.8	77.9
Dyslexia and basic skills	4	0	20.2	95.6
Setting up learning centres	4	47?	67	35.1
Other	22	9.7	8.5	?

NB: % of cases adds up to more than 100 because respondents gave more than one answer. Where '?' is entered, it is due to a corresponding response not being available from that data collection activity.

As table 23 demonstrates, union learning representatives reported activity in excess of that perceived by the affiliate unions in the following activities: promoting the value of learning, offering IAG, activities dependent on local structures, and activity that responds to basic

skills needs. There was no evidence given of union learning representatives particularly dealing with dyslexia issues nor did they express the need for further training to support dyslexia issues with members. As shown in Table 25, affiliates perceive that union learning representatives are more involved in 'getting information on learning opportunities' and 'other'. The activities where affiliates perceive union learning representative activity is more or less equivalent to that reported by the union learning representatives are: negotiating learning with the employer (except for the 2009 survey where there was a 13% increase on responses given at ULRS2), and helping colleagues to get funds for learning, where there were equal findings at ULRS1, an almost 7% decrease reported at ULRS2, followed by an almost 20% increase reported in the 2009 survey. In addition to the above table, 74% of affiliates who responded reported that their union learning representatives got involved in assessing learning needs of learners in the workplace, whereas union learning representatives reported that around 50% of them were involved in assessing learning needs at this time. Affiliates reported that the assessment of learning needs tended to be via a variety of formal methods: survey 57%, a figure that is in excess of union learning representative reports (ULRS1 44%, ULRS2 44%), formal meetings 17% (ULRS1 16% ULRS2 17%), and one-to-one discussion with colleagues 65% (ULRS1 37%, ULRS2 37%). Informal approaches were used but to a lesser extent according to affiliate responses: ad-hoc meetings 35% (ULRS1 30%, ULRS2 37%) and 'in passing' 39% (ULRS1 66%, ULRS2 61%). Thus affiliates underestimate union learning representatives' informal needs' assessment activity, which appears to be completed more often as and when an opportunity for a discussion with a colleague presents itself rather than as a formal, resourced activity. Again it is proposed that affiliate unions occupy quadrant A as regards their perceptions of the reality of their union learning representatives' activity.

Monitoring

As discussed elsewhere in this thesis, record keeping and reporting on the outcomes of funded activity is an LSC requirement of unionlearn with the North-West TUC. Record keeping suggests formalisation of the role in the workplace. This is an instance of a situation where the expectation of the role of the union learning representative differs to that of other union roles within the workplace.

Affiliates were asked if their union learning representatives monitored the progress of colleagues who had taken up learning opportunities: four affiliates reported 'yes', eight said 'sometimes', and one said 'never'. Where progress was monitored, both formal and

informal methods were reported as being used, with the majority of responses suggesting formal methods but little detail was given as to the nature of these. Union learning representatives' report of monitoring activity is presented in table 25 below:

Table 25: union learning representatives monitoring progress

	ULRS1	ULRS2
always	36.2%	42.9%
sometimes	36.9%	30.5%
never	26.9%	26.7%

The affiliates appear to have been erring on the side of caution as to the level of monitoring activity by their union learning representatives. Union learning representatives present a more active position. This does suggest however that the affiliate unions at regional level were not clear as to the reality of activity at local level.

Where progress was monitored, both formal and informal methods were reported as being used, with the majority of responses suggesting formal methods but little detail was given as to the nature of these. Of the affiliates who responded, 26% reported their union learning representatives always keep records, 39% sometimes, and 9% never kept records. This compares to union learning representative responses at ULRS1 of 50.4%, 30.8% and 18.8%, at ULRS2 48.4%, 32.1% and 19.5% respectively. Thus the affiliates tend to under report record keeping activity amongst their union learning representatives. According to the affiliates these records were mainly paper based or in a diary/log type system; 17% reported that the format of records were individual to the union learning representative but forms/proforma were being devised or the format had yet to be determined. Union learning representative at ULRS1 and ULRS2 reported that 30-40 % of their records are paper based and a further 30-35% kept electronic records. This discrepancy suggests that affiliate unions occupy quadrant A as regards their perceptions of the reality of this aspect of activity.

As regards union learning representatives providing reports on their activity, there was a 50:50 split from affiliate respondents. Where reports were made, 48% state these were to the union, 13% to employer, and 4% to the TUC. The format of these reports varied from: meeting with Project Workers, reports on Union Learning Fund (ULF) projects, written

reports to branch meetings and steering groups, and web-based reporting through to word-of-mouth. Table 25 below illustrates the union learning representatives' report of the methods they practice. Overall there appears to be parity with the unions' ideas of how union learning representative activity is reported. The increase to 62.2% at ULRS2 suggests that by this time the role was becoming more embedded in branch structures.

Table 26: union learning representative reporting process - formally/informally

Method	Formal		Informal	
	ULRS1	ULRS2	ULRS1	ULRS2
At branch meetings	28.1%	62.2%	4.1%	0%
Report forms	22.2%	0%	74.4%	0%
Written reports	27.5%	17.5%	9.1%	3.1%
Emails	6.4%	10.5%	0.8%	53.1%
Presentations	3.5%	2.8%	0%	31.3%

In summary, as regards union learning representative activity within the region, the regional officers appear to occupy a variant of quadrant B (low power/variable level of interest). The power at local level, as discussed previously, is held by the employers overall but with the branch officers occupying quadrant D as to how monitoring and reporting is practiced within their branch. The union learning representative(s) occupy quadrant B (high power/ but with a variable level of interest) as to the extent to which monitoring and reporting of their activity and its outputs is provided.

When asked, affiliates reported successes from union learning representative activity as the growth of learners and learning centres, added value for members, and basic skills projects. When asked what supported this kind of achievement, affiliates reported that support came from good employer relations, Project Workers, employer/union partnerships, and union learning representatives reporting what they have achieved and thus creating further uptake and involvement by colleagues. When asked what might inhibit this achievement, affiliates felt inhibitors were poor employer relations, the newness of the role, time constraints, lack of communication from union learning representatives, the aims and objectives of unions (at the time of the survey some unions did not consider union learning representative activity as a strategic issue for them), and a lack of formal recognition of the learning and skills agenda at regional/branch level. Affiliates provided other useful general comments such as:

“Ongoing negotiations with employers that would allow for a significant expansion in numbers and training.”

“Paid release for learning is an incentive, as is matched time for learning.”

“Communication needs to be improved. We may not always be aware of the work union learning representatives are undertaking.”

“Currently developing a structure for union learning representatives.”

Once again the data evidences the nature of the employment relationship is crucial, recognises the high power held by the employers and the need for the local and regional PSHs to work together to achieve best fit for effective union learning representative activity at the local level.

Conclusion – the affiliate context

Affiliate unions support the learning and skills agenda. It adds to and informs their activity via ULF-funded projects and the recruitment of union learning representatives and their activity within the workplace. As identified by one of the respondents, the ‘newness of the role’, and thus the opportunities and expectations of what comes with it, were still being identified and addressed by the unions. The achievement of the national target for 22,000 trained union learning representatives by 2010 was a challenge for all parties involved. It clearly appeared that there was the requirement for ongoing co-operation and support between the unions and unionlearn with the North-West TUC to establish protocols and procedures to develop and sustain union learning representative activity. A further fundamental issue was the development of information management systems to facilitate the provision of evidence of outcome activity required by the LSCs to maintain funding for the activity. The requirement to provide such evidence, to external agencies, is an additional requirement of the union learning representative role that sets it apart from other lay duties. All sides of the employment relationship need to acknowledge this, if effective union learning representative activity is to be facilitated, developed and sustained, and if it is to deliver its potential within workplaces in the North-West region of England.

North-West LSCs' Perspective of union learning activity in the North-West Region of England

When this data was collected, in 2005/06, the 2005 TUC/LSC protocol had only recently been published. Thus, at this stage, the experience of the relationship had informed the protocol, rather than the expectations of the protocol informing the relationship between the TUC and the LSC. The national level LSC was the funding agency for the union learning representative initiative via their regional offices. The starting position for this PSH was perceived as occupying quadrant D of the power/interest matrix at both national and regional level. The aim of the interviews with representatives from LSCs working with unionlearn with the North-West TUC was to identify North-West region LSCs' view of union learning representative activity and to find out how LSCs would like to see the initiative progress. Interviews were held with the Regional Skills Director and Workforce Development Programme managers in Greater Merseyside (who manage the relationship on behalf of the region), Greater Manchester, Warrington and Cheshire, and with the Director of Skills for LSC Lancashire.

“The TUC and LSC will work positively and actively together nationally, regionally and locally to help maximise the contribution of each organisation to promote learning and skills and raise demand among young people, adults and employers.”

(LSC and TUC, 2005)

This is the vision of the TUC and LSC Protocol, 2005. Within the North-West region there was a significant history, from 1998, to the data collection, of an effective working relationship between TUC Learning Services and the Training and Enterprise Councils (TECs, pre-2001) and TUC Learning Services, now unionlearn with the North-West TUC, and the Learning and Skills Councils (LSC, post-2001). It was acknowledged that the North West had agreed a higher target for union learning representatives (1999-2000) than all other regions together. The North-West region has been the catalyst for change in respect of the Union Learning Representative agenda. This suggests that the North-West region LSCs occupied quadrant D. The LSC were asked to describe the nature of their relationship with the union learning representative initiative. It was reported that there was a good working relationship at strategic level. At operational level, whilst still 'good', approaches were found to be changeable and variable. It was acknowledged that this was a side effect of the context in which Development and Project Workers are employed. Their terms and conditions of employment tend to be short-term secondments and short-term employment

contracts due to the funding mechanism for these roles. Thus it is sometimes difficult to develop longer-term working relationships and work together to develop robust and agreed reporting systems and procedures. It was acknowledged that there needs to be an effective support process for newly appointed Project Workers as regards unionlearn and LSC expectations of the monitoring process.

The TUC and LSC protocol (2005) identifies key shared priorities, including: equality and diversity, implementation of the Skills Strategy, national employer training programme (developed into Train to Gain), the Skills for Life Strategy, apprenticeships, the provision of information, advice and guidance (IAG), and improving the skills of workers who deliver public services. Within the North-West region, early priorities were for initial union learning representative training and identification of Skills for Life needs in the workplace. This suggests the occupation of a high power quadrant for both local branches and local employers. The champion for union learning representatives was and remains unionlearn with the North-West TUC, with the impact from union learning representative activity being as a result of unionlearn going into workplaces and using union learning representatives to develop activity. It was stated that originally there was an expectation that activity would facilitate employer engagement, but there is limited evidence that the union learning representative agenda can influence this. Union learning representatives tend to achieve individual engagement with colleagues.

LSC funding is fundamental to unionlearn with the North-West TUC activity. Funding allocation was a regional decision based upon proposals from the Regional Manager, unionlearn with the North-West TUC, and evidence of performance against targets from the previous year. There was opportunity to supplement initiatives to meet specific local needs from local initiative funding. Confirming the regional LSC occupancy of quadrant D. Across the region, the LSC identified that the best return from funding to date was in the number of trained union learning representatives, union learning representative networks and workshops, union learning representatives working with colleagues to get people involved in learning, and there is some evidence of effective Skills for Life activity. This indicates that unionlearn and the affiliate unions at regional level along with their local branch colleagues were occupying quadrant D against activity that attracted LSC funding. Networking amongst different contract holders had also been seen to be effective, where different members of the employment relationship appreciate each other's perspective in relation to workforce development related issues. Trade union learning centres on

employers' premises were effective but there is a question of their sustainability once external funding finishes. A number of examples from the region were cited where these have not been underpinned by employer funding and once external funding is removed they tend to become more of a resource centre than a learning centre.

The LSC evaluated the effectiveness of funded projects by looked at the following: hard evidence, numbers achieved, outcome activity, people completing courses, and noting where employers and employees are taking up funding provision.

They also used a combination of returns, against profiles of outcomes, via the end of year report produced by unionlearn's regional Development Workers. The annual (from 2002) National Employers' Skills Survey also provided evidence at national level. Effective evaluation of outcomes is an issue for both the LSC and unionlearn. One representative commented that the whole issue of evidence is about activity response against funding not numbers. If contract holders, such as unionlearn, cannot say how many union learning representatives are active and what is the activity of those union learning representatives, it is difficult to justify ongoing funding. Union Project Workers were expected to be getting individual unions working on their own to recruit and support union learning representatives and provide appropriate evidence of this. Overall the modus operandi was that the funded projects were co-ordinated through unionlearn with LSC operating at arm's length to the actual activity. This suggests that unionlearn as the contract holder occupies quadrant B (low power/high interest) as they have limited influence over the local branches and employers whose support is crucial for union learning representative activity to be practiced.

The LSCs were asked what they considered enhanced the effectiveness of funded union learning representative projects in the region. Responses included:

"When it is not operating in isolation from other activities, union learning representative activity is only part of the jigsaw."

"Experienced people who take working through union representation seriously. However this could inhibit other side as reporting from one perspective."

"Unionlearn need links with other partners not just affiliates and union learning representatives, e.g. Business Link."

“Being proactive about working processes. Need to consider the impact of the protocol, reducing budgets, the shifting role of unionlearn as affiliates become more involved in union learning representative activity.”

“Champions for union learning representative activity within the workplace, encouraging employer engagement. Have to get management buy-in.”

“The area in which union learning representatives operate, developing effective relationships with colleagues to address Skills for Life needs, union learning representative credibility and visibility within organisations.”

The above quotes emphasise the need for high interest from employers and their employees. LSCs were also asked what they consider inhibits the effectiveness of funded union learning representative projects in the region. Responses included:

“The need to reflect the positive nature of the relationship with unionlearn enjoyed at strategic level and at operational level.”

“(Unionlearn) could be more proactive, innovative and suggesting, not just complying to contract. Not just doing ‘more of the same’.”

“Activity tends to focus on working with large organisations; there is a need to increase activity with SMEs. Suggesting maybe a peripatetic approach for affiliate and unionlearn representatives.”

From the above quotes, it appears that the relationship between this PSH and unionlearn was working at regional level but was less effective at local workplace level. Demonstrating again the power of the employer and the power of the affiliate unions in facilitating the activity.

When the data was collected, the information management from LSC to unionlearn, to providers and back, did not readily provide the evidence required for unionlearn to confirm the outcomes from their activity. For example, unionlearn knew how many referrals had originated from them but providers did not necessarily know which of the learners who presented for courses were unionlearn referrals. Therefore hard evidence of the number of unionlearn referrals who complete a programme of study was difficult to establish.

There were also issues with the ability of FE colleges to provide for union learning representative training and for colleagues' identified learning needs.

The LSC identified a need for union learning representatives to work in partnership with Business Link to establish activity within an organisation, then for the on-site union learning representatives to maintain that activity after Business Link had moved out. A further example of the power of the employer and indicating employers' occupancy of quadrant C of the power/interest matrix. Further representatives from the LSCs provide a variety of views of employer support for union learning representative activity in the region:

"A 'mixed bag'."

"It is so dependent on the employer. Employers can see it as restrictive, e.g. not allowing non-union members into learning centres."

"With most large employers it is good, but in non-organised and SMEs union learning representatives are not recognised."

"Since union learning representatives have been around, employers are more aware of the skills agenda, especially in the public sector, however it is a different situation in the private sector."

"Employers' response is pretty good, good with the organised workforce. Union learning representatives have to demonstrate credibility to get the employer on board. If union learning representative activity is viewed by the employer as a barrier and to incur cost, then it is unlikely that partnership will be achieved with the employer."

"Some employers tolerate union learning representatives, they are seen as a necessity rather than as a resource. Again, it depends on the credibility of the union learning representative(s)."

"Employers consult with and use union learning representatives to their own advantage."

"Evidence has to come from reporting against the elements of the contract."

"LSC do not deal with employers."

“Employers are happy to support union learning representative activity and related initiatives if they’re not having to pay. Employer Training Pilots (ETP) provide some evidence of this.”

Thus there is further evidence of the importance of the nature of the employment relationship. From this evidence it is clear that many employers occupy quadrant C particularly but not exclusively in the private sector and in SME workplaces. There does appear to be the opportunity for the union learning representative to have some power over influencing employers’ attitudes via the quality of their activity.

The LSCs were asked how the TUC and LSC protocol would be facilitated in the region. They responded that dialogue was to be sought with the Regional Secretary of the North-West TUC and the Regional Manager of unionlearn with the North-West TUC, using the protocol to identify priorities. It was to be driven by the Greater Merseyside office on a regional basis and replicated across the region. At the time of these discussions it was established that there was some union learning representative activity in some LSC workforce development offices. As a PSH, this demonstrates that in some instances they practice what they preach but this was not presented as being a given in every LSC Office.

LSC representatives identified what they saw as opportunities for further unionlearn with the North-West TUC activity:

“Delivery and facilitation of the information, advice and guidance (IAG) agenda to MATRIX standard appears to be more appropriate than expecting union learning representatives to achieve employer engagement. Unionlearn with the North-West TUC has a unique selling point and needs to ensure it capitalises on that.”

“Influential regional skills partnership via the Regional Secretary of the North-West TUC.”

“Regionally unionlearn are key as co-ordinators for the Union Learning Fund (ULF) (the national LSC budget that individual unions apply to for funding to develop major priorities).”

This data identifies the crucial role of key PSHs within the region. Unionlearn with the North-West TUC has a key role to encourage partnership across PSHs as they have contact with other PSHs within the region.

LSC representatives identified their concerns for further unionlearn with the North-West TUC activity:

“The impact if ‘key individuals’ were no longer involved in the agenda.”

“Outputs and outcomes, sometimes poor performance.”

“LSC opportunity to tap into hard to reach employers via Train to Gain, unionlearn have the opportunity to access hard to reach learners in the public sector.”

Further demonstrating the high power of local employers, affiliates and employees, in facilitating access to hard to reach learners at the local level, for national level initiatives. Other insightful comments from these discussions for example, an analogy made with other contracts that require pump priming but where impact is slow to achieve. It was felt that the contracting process was robust across the board but sometimes the monitoring process for this contract was less robust. It appeared that systems were not in place for managing information from the unionlearn side. Also there was some acknowledgement that effective evaluation systems were not available from the LSC side. Further evidence of the high power position held by union learning representatives as regards the reporting of their activity and its outcomes to the funding agency. The LSC representative stated that the LSC is more inclined to support a successful forward-thinking organisation.

Conclusion – the LSC context

LSCs have over time, and continued to have, a positive relationship with unionlearn with the North-West TUC. Such working relationships were fundamental to the partnership at both strategic and operational level. LSCs’ approached each contract in a fair and equitable manner and required robust evidence of outcome activity for the funding provided and in order to secure further funding. Information management systems and procedures did not always facilitate this. The level and nature of information management and the sharing of relevant information, by all stakeholders, required review and some substantial development to facilitate this.

Employers

Two methods were applied to gather data from employers. A postal survey to contact 1,281 employers listed on the TUC Learning Services database: 67 surveys were returned, a response rate of 5.2%. An electronic survey was issued by Call North-West (CNW) (part of UCLan) to 431 employers who have an affiliation to UCLan in respect of call-centre activity: five returns were received, a response rate of 1.16%. CNW then attempted to contact the non-respondents to encourage further responses. However, none of these calls prompted further returned questionnaires, due to the 'sensitive' nature of the questionnaire or a lack of understanding of it. Objections to completing the questionnaire were as follows:

"Not comfortable disclosing information."

"No union learning representative activity."

"Not interested."

"Not speaking to relevant contact within the organisation."

"union learning representative identity unknown."

"Outright 'No, Thank you'."

"Not convenient to talk (and no subsequent 'right moment' thereafter)."

"Unable to contact."

"No response to messages left."

No clear evidence can be established from such a poor response rate. The evidence in this section is to provide a flavour of employer opinions from the responses received. It also has to be acknowledged that all organisations on the unionlearn with the North-West TUC database have or have had trained union learning representatives within their organisation. This data suggests that many employers occupy quadrant C of the power/interest matrix.

Profile of organisations

From the responses received, 45% were from the public sector, 51% from the private sector and 4% from the voluntary sector. The main sectors represented were:

Public administration, education and health	42%
Manufacturing	28%
Distribution	15%
Transport and communications	11%

Of the respondents, 80% were organisations with 200+ employees, 13% had 50-199 employees and 6% had 10-49 employees. The main unions represented in these workplaces were TGWU, Amicus, UNISON, GMB, and USDAW. Of respondents, 76% reported that there were union learning representatives in their organisation, and 24% said there were no union learning representatives. The table below gives the number of union learning representatives reported to be within the organisation of the respondents.

Table 27: Number of union learning representatives in organisation

Number of union learning representatives	
1 -5	62%
6-9	17%
10-15	8%
16-19	2%
20-25	6%
26-30	2%
90	2%
334	2%
Total	101%

Total equals 101% due to rounding

These findings correlate with the findings from both union learning representative surveys. The reports of 90 and 334 union learning representatives within the organisation suggest reporting of national figures rather than local workplace union learning representative figures.

The organisations that responded reported 94% organisational awareness of statutory rights for union learning representatives. Of the organisations responding, 63% had a learning agreement to support union learning representative activity and 98% of those had been jointly negotiated between the employer and the union learning representative. All had been accepted between 2001 and 2005 with the majority between 2002 and 2004. Of these agreements, 96% incorporated statutory rights for union learning representatives. The average paid hours per month given to union learning representatives were as laid out in the table below:

Table 28: Paid time for union learning representative activity

Paid hours per month	
0	7%
1-5	22%
6-10	31%
11-15	3%
16-20	7%
25-30	6%
30-35	6%
40-45	6%
60-65	6%
96	3%
100	3%
Total	100%

The majority of organisations report that union learning representatives are given some resources to facilitate their activity, e.g. office, telephone, computer access, learning centre. Demonstrating the high power position of employers as regards the provision of resources within the workplace to facilitate union learning representative activity.

The survey asked which department was responsible for learning, training and development within the organisation but the majority response was 'other'. The employers were asked to rate the relationship between this department and union learning representatives as evidence from the union learning representative data suggested that there can be conflict between union learning representative activity and the learning, training and development practitioners within organisations. The majority declined to comment maybe suggesting low interest in this aspect of the employment relationship but there were reports of 'very positive' and 'positive'.

Employers were asked where they sought information and guidance on facilitating union learning representative activity; the following sources were cited: Acas, Business Link, Chartered Institute of Personnel and Development (CIPD), LSC, and the union and TUC Learning Services. As front-line managers are crucial to the facilitation of everyday union learning representative activity, employers were asked how line managers were given guidance on facilitating union learning representative activity. Some said via the learning agreement, one reported a specific development programme but the majority reported they did not know.

When asked what barriers employers experienced to union learning representative activity. There were reports made against the following categories:

Table 29: Barriers to union learning representative activity

Barriers
Lack of employee support
Lack of senior management support
Lack of line manager support
Lack of time
Lack of resources
Conflict between training department and union learning representatives
Lack of on-site learning centre

This demonstrates within the workplace that employers, their representatives, employees, all of whom are PSHs, crucial to the facilitation of union learning representative activity, occupy quadrant C.

As regards negative outcomes of union learning representative activity, employers reported about:

- Confusion as to where employees should go for advice on learning and training opportunities.
- The ambiguity of role of the training department viz-a-viz the role of the union learning representative.
- Employers reported that they experienced positive outcomes from union learning representative activity as follows:
 - Engaging workers who might be reluctant to discuss their learning needs
 - Allies in promoting the value of learning and training within the organisation
 - Generating ‘bottom-up’ demand for learning
 - Source of advice for employers
 - Increase in production/service provision

This data suggests a level of partnership working within some workplaces.

Finally employers were asked what their future hopes and fears were for union learning representative activity, and their responses are presented in the table below.

Table 30: Hopes and fears for union learning representative activity

Hopes	Fears
Promotion of lifelong learning in the workplace	Additional management time taken up on meaningless consultation
None, unless there is a change in employee support	Front-line advice might contradict training procedures already in place.
We do not have trade unions	

Conclusion – the employers’ response

As stated at the beginning of this section, because of the low response rate these findings can only be acknowledged as a flavour of employer attitudes towards union learning representative activity. However, limited as these are, there is an indication of the need for meaningful dialogue between the different members of the employment relationship both within and between organisations and agencies. Union learning representatives are well placed to support organisations meeting some of the informing and consulting requirements of the revised (April 2004) Investors in People (IIP) standard. Opportunities also appeared to exist for unionlearn with the North-West TUC to gain access and contribute to appropriate employer forums and networks to provide information, advice and guidance on union learning representative and related activity.

Given the limited response rate, the findings cannot be claimed to be representative of employers as a PSH. What they demonstrate however is that these employers present barriers to union learning representatives meeting the expectations of other PSHs. Such a response was also demonstrated via the literature review in Chapter Three on Workplace Learning and Chapter Five on UK NVET policy. This might indicate that employers’ response to the initiative is similar to their response to learning and development in general.

Grugulis (2007) provides further evidence that employers occupy quadrant C.

“Yet in Britain at least, participation lags far behind support. It is not that employers and employees are not aware of the advantages of training and development. They are. They simply choose not to engage in it.”

(Grugulis, 2007:3)

Stakeholder Mapping

Figure 5 below maps the application of the power/ interest matrix referred to in the discussion of the findings. The levels, as identified in the representation of the chain of corporate governance (adapted from Johnson and Scholes, 1997:186) for the union learning representative initiative introduced in Chapter 2, page 18 have been applied to the matrix to demonstrate at which level as well as at what strength, the power and interest of each PSH is reported to be influencing union learning representative activity. As illustrated below, the evidence from the North West region of England has identified the major influence to be from employers at the local level occupying quadrant C. The impact of this is illustrated at local level for members and colleagues and union learning representatives

occupying quadrant B. The two-way arrows demonstrate that they are prone to shift to occupation of quadrant A. The cause of this is when activity does not meet the expectations of members and colleagues and for the union learning representatives when their activity is blocked. Thus there is a vicious circle created that ultimately results in union learning activity not meeting the expectations of its PSHs because union learning activity is not being facilitated.

Figure 5: Stakeholder Mapping: the power/interest matrix re: union learning representative activity in the North-West region of England

		Level of Interest	
		Low	High
Power	Low	A: minimal effort Government LSC TUC (unionlearn) unions employer associations LSC TUC (unionlearn) Unions x3 employers unions x2 members/colleagues x1 ↔ union learning representatives x3 ↔	B: keep informed Government LSC TUC (unionlearn) unions employer associations LSC TUC (unionlearn) x4 Unions x4 employers unions x2 members/colleagues x1 union learning representatives x6
	High	C: keep satisfied Government LSC TUC (unionlearn) Unions employer associations LSC TUC (unionlearn) x1 unions x2 ↔ employers x18 unions x3 members/colleagues x3	D: key players Government x1 LSC x2 TUC (unionlearn) x3 Unions x3 employer associations x1 LSC x4 TUC (unionlearn) x2 unions x5 employers x4 unions x5 members/colleagues x2

union learning representatives x2	union learning representatives x3
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The other two-way arrow represents evidence that the reaction of regional level unionlearn with the TUC to the initiative can be affected by the nature of the region's relationship with national unionlearn with the TUC. The evidence presented in the findings and the mapping of incidence of PSH power/interest demonstrates that employers, at the local level have the most significant impact on whether or not union learning representative activity is facilitated or inhibited. Employers are fundamental to any union learning representative activity taking place; they need to be on board.

It is important to consider how the introduction of the initiative was managed in respect of the employers. In considering the application of the various stages of the management of change (outline below), it indicates how little the responses of employers have been considered so far. At the identification of resistance stage, neither the government nor the unions appear to have considered that resistance might come from the employers. At the allocation of responsibility and implementation strategies stages, the CBI and the CIPD to some extent represent the employer voice in the change management process and at national level appear to occupy perhaps a variation of quadrant D (high power/ with medium-high interest). Neither of these organisations can 'make' employers facilitate union learning representative activity unlike the government which can make unionlearn participate via funding strategies. Unionlearn can encourage the like-minded affiliate unions to support the activity via IAG and funding opportunities, with the carrot of providing an avenue for organising opportunities with access to hard to reach colleagues. Where is the carrot for employers? At the local level, union learning representatives and their unions might consider applying Hining's (1983) model to introduce the change, when union learning representatives and their activity are introduced into the organisation.

1. Diagnosis
Being clear what they want to achieve via the role and its activity
2. Identifying likely resistance
Management representatives of the employer and some members and/or colleagues
3. Allocating responsibility

Identifying champions for the cause amongst the management population

4. Identifying and implementing strategies
5. Monitoring.

Stewart (1996:22)

Conclusion

The union learning representative role descriptor (TUC, 2004:7) was applied as the benchmark for union learning representative activity for this research project. The following tables 31 and 32 provide an overview of the key findings against these activities, as presented in table three at the beginning of this chapter. From this summary, the findings demonstrate that the vast majority of union learning representatives are successfully completing activities 1 and 2, which are linked to awareness raising and providing information, advice and guidance to members. This is still dependant on access to members/employees via the high power employer and their representatives such as line managers and HR Officers. In respect of activity three, only 50% get the opportunity to work with their employer in identifying learning needs. Likewise most can only aspire to activity four, ensuring equal opportunities for learning and development opportunities for members. Likewise with activity 5 that refers to union learning representatives negotiating Joint Learning Agreements with their employer. Both activities require the support of their high power branch colleagues and the local negotiating team. Activities 6 and 8 are only applicable to 20 per cent of union learning representatives. Where the opportunity for union learning representatives to participate in activity 7 which expects union learning representatives to establish and run learning centres is declining over time. As reported by the LSC funding managers, trends suggest that as public funding for learning centres decreases so does employer facilitation of such resources, further demonstrating the employer occupying quadrant C. A significant 80 per cent of union learning representatives however reported that they get involved in monitoring the quality of learning and development provision and the progress of colleagues (activity nine). This confirms the opportunity for union learning representatives to be involved in evaluating the impact of learning and development opportunities. This appears to be the only opportunity for the union learning representative to occupy a high power position in respect of their activity, as discussed in Chapter three on workplace learning.

Table 31: Overview of Key Findings: Activities 1-9

		Practice	Government	Employers	Unionlearn/Unions	Members	Scope of union learning representative Role	Co-operation between PSHs
1.	Raising employees awareness of benefits of learning	Vast majority	Not a quick-fix solution	Espoused vs facilitation in practice	Another service for members	Need to believe in themselves	Need to be informed and knowledgeable	For effective union learning representative activity
2.	Providing learning advice and guidance to employees	Vast majority		Have confidence in union learning representative's knowledge	Newly trained ULRs need support from experienced reps	Have to have confidence in union learning representative	High ratio of members to union learning representative	To appreciate reality of union learning representative role
3.	Working (with employers) [author's brackets] to identify learning needs	50%	Other initiatives such as Investors in People can encourage employers to include union learning representatives in identifying learning needs	Random interpretation of the statutory rights. Espoused vs facilitation in practice. Supplementary to employers' activity therefore support/resourcing can be low. Resistance from HRM/D colleagues. Lack of employer support is demotivating		Sometimes reluctant to participate	Can be overwhelmed. Legitimacy of role can be challenged	
4.	Securing equal opportunities in learning	Aspire to this	National employment relationship informs employer attitude	Nature of employment relationship informs employer attitude	Joint learning agreement	Work patterns and locations have major impact	Inhibitors tend to be beyond their control	Occurs but not always in favour of union learning representative activity. Crucial to espouse and practise equal opportunities

		Practice	Government	Employers	Unionlearn/Unions	Members	Scope of union learning representative Role	Co-operation between PSHs
5.	Negotiating learning agreements with employers including time off for study	union learning representatives alone cannot achieve this		Commitment from the top of the organisation is crucial. Need to practise what they preach	Need to be behind union learning representatives. Learning agenda has to be a fixed item on branch agenda		union learning representatives often prohibited from negotiation activity. Have to inform then consult with branch and the employer to initiate their commitment to a learning agreement	Joint consultative committee
6.	Helping employers to establish employee development schemes	< 20%		Inhibited if espoused commitment at the top does not match line managers' practice. Can support other business objectives	Need to educate and lobby decision makers	Have to be given time to learn	union learning representativeS can develop to facilitate this level of activity. Experienced union learning representative	Can facilitate this
7.	Establishing and running trade union learning centres	Declining over time	Funding cuts result in closure of learning centres	More likely to facilitate if external funding available	Need to educate and lobby decision makers. Often an outcome of a joint learning agreement		Can develop the union learning representative's role	Can facilitate this

		Practice	Government	Employers	Unionlearn/Unions	Members	Scope of union learning representative Role	Co-operation between PSHs
1.	Supporting innovative workplace development such as Union Learning Fund projects	20%						
2.	Monitoring quality of provision. Progress of colleagues(always)	80%	Variable quality and format of monitoring activity		Requires to be standing item on branch agenda		Less than half engaged in formal monitoring activity	
3.	Levels of NW Region union learning representative activity	variable					Linked to time in role. Longer serving union learning representatives were most active	Vulnerable in first two years of role. Requires support from PSHs

Table 32: Overview of Key Findings: Other Items I- IV

Other Items		Practice	Government	Employers	Unionlearn/Unions	Members	Scope of union learning representative Role	Co-operation between PSHs
I.	Levels of NW region union learning representative activity	Variable					Linked to time in role. Longer serving union learning representatives were most active	Vulnerable in first two years of role. Requires support from PSHs
II.	Barriers to the union learning representative role			Lack of employer support	Lack of branch support	Complacency of members	confidence	When PSH agendas do not facilitate union learning representative activity
III.	Impact of time away from job on workplace relationships			Target driven attitudes do not support union learning representatives or learners taking paid time away from job		Can view union learning representative absence as a negative issue	On return often have to make time up	
IV.	How has your union learning representative role changed							

Other Items		Practice	Government	Employers	Unionlearn/Unions	Members	Scope of union learning representative Role	Co-operation between PSHs
>			Lobby decision makers	Supports and facilitates role Identified learning roles where relevant in business objectives	Lobby decision makers. Learning agreement. Learning creating its own niche in branch structure	Gaining members' interest	Lobby decision makers. Support members through challenging times as well as enhancing current experience. Can become more of an admin role	Work together to facilitate the activity particularly HRM/D colleagues
<				Lack of support in the workplace. Anti-learning culture in the workplace. Elitist attitudes to learning and training in organisations	Lack of support from the union and the branch. Lack of a learning agreement	High ratio of members to union learning representatives. Want to learn and train in paid time for funded learning and training activity		

Hence, the ability of union learning representative activity to meet the expectation of its PSHs is mixed but often the inability to do so is linked to a lack of co-operation by one or other of the PSHs and often this is the employers at local level.

In summary, the following are presented as the key issues that have emerged from consideration of the findings from the secondary and primary research:

1. The majority of union learning representatives in the North West of England are involved in activities 1, 2 and 9 of the existing role descriptor.
2. The impact of the level of power and interest demonstrated by PSHs at local, regional and national level, on union learning representative activity.
3. The initiative is still evolving and requires continued nurturing and support to develop and sustain it.
4. There is a need for continuing awareness raising and education about the initiative for some of the PSHs, i.e. union officials, and officers. There is a need for information, advice and guidance for employers.

The following chapter will consider the key findings and how they compare to the literature previously discussed in this thesis related to workplace learning; unions and learning; the links between the union learning representative initiative and the UK's national vocational education and training (NVET) policy.

Chapter 8: Discussion

The research presented in this thesis has sought to answer the question:

To what extent is union learning representative activity meeting the expectations of its principal stakeholders?

This chapter aims to discuss the key findings presented in Chapter Seven, in line with the main arguments presented in the literature concerned with Workplace Learning (Chapter three) Unions and Learning (Chapter four), union learning representatives and UK vocational education and training policy (Chapter five).

The key issues from the findings are:

1. The majority of union learning representatives in the North West of England are only involved in activities 1, 2 and 9 of the existing union learning representative role descriptor (TUC, 2004).
2. The impact of the level of power and interest demonstrated by PSHs at local, regional and national level, on union learning representative activity.
3. The need for continuing awareness raising and education about the initiative for some of the PSHs, i.e. employers, union officials, lay officers and members.
4. The need for information, advice and guidance for employers.
5. The initiative is still evolving and requires continued nurturing and support to develop and sustain it.

The evolution of the union learning representative initiative was a result of the CBI and the TUC lobbying respective governments from 1990. The overall expectation for the union learning representative initiative was expressed by the TUC as:

“In developing such union capacity we need to create a union ‘learning’ representative. Just as health and safety representatives have helped create safer workplaces; union ‘learning’ representatives could help create learning workplaces. That is what our union learning services proposals aim to do.”
(TUC, 1998:5)

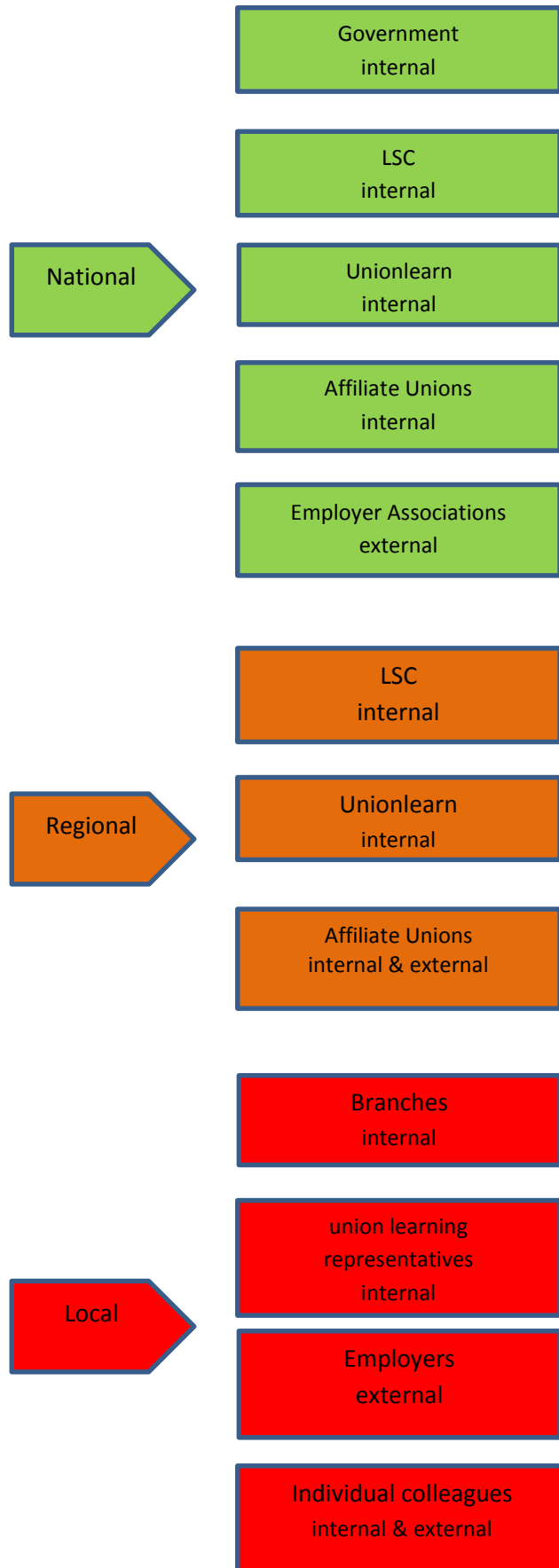
It is proposed here that the union learning representative initiative has been seen as an implementation tool to develop workplace learning in the UK.

Since 1998 the Department for Business, Innovation and Skills - BIS - (and its predecessor departments) have invested over £150m. in the development and maintenance of the

union learning representative initiative. Investment currently stands at £21.5m. per annum. Analysis of data, collected on behalf of unionlearn with the North-West TUC, identified there were key players who had an interest in the success of the union learning representative initiative: the government and its agencies, unionlearn, affiliate unions, employers, and union members. The union learning representative role descriptor (TUC, 2004) has been selected as the benchmark for what the principal stakeholders (PSHs) expect from union learning representative activity. The primary and secondary data collected has been analysed to identify the extent to which the role descriptor represents the reality of union learning representative activity.

In Chapter two, literature concerned with Stakeholder Theory confirmed that the key players in the initiative could be identified as stakeholders. The literature identified two models that have been adapted and applied to examine both primary and secondary data. The first, the chain of corporate governance, (Johnson and Scholes, 1997:186) Figure 6, below has enabled the representation of the distance between the architects and primary decision makers for the design of the initiative through to those stakeholders who facilitate its implementation and practice within the local workplace. A colour coding system has been applied, analogous to traffic lights, to illustrate their state of readiness to engage with the initiative. Introduction of the initiative was devolved from national level to regional level representatives of the principal stakeholders (PSHs). Delivery of the initiative was/is dependent on the buy-in of local level representatives of the PSHs. Local level PSHs were not involved in the decision making and design process. National employer associations, such as the CBI (Confederation of British Industry) and the CIPD (Chartered Institute of Personnel and Development), have no formal influence on the behaviour of employers in respect of learning opportunities for employees. The TUC is the national representative of their affiliate unions but has no jurisdiction on their *modus operandi*. The second is the adaptation of the power/interest matrix, (Johnson and Scholes, 1997:198) figure 7 page 234. This has been applied to identify the impact of the level of power and interest displayed by PSHs, in respect of the initiative and actual union learning representative activity.

Figure 6: Chain of corporate governance for the union learning representative initiative adapted from Johnson and Scholes (1997:186)



Given the enthusiasm and the aims for the initiative espoused by PSHs at national level, could any employer resist supporting the role of union learning representatives within their workplace? The evidence from the North-West region of England suggests they can and do. The initiative was orchestrated at national level but the rhetoric at national level is often at odds with the reality at local level. It is at local level where the power lies with employers, members and/or colleagues and to some extent union branches, to facilitate or inhibit the initiative and therefore union learning representative activity. In order to achieve the necessary buy-in from PSHs, they have to be clear about what union learning representatives can do for them. The evidence from this research suggests that employers and members and/or colleagues are not clear as to what union learning representatives can do for them. There is variable clarity amongst the local level trade unions. Thus these three PSHs occupy quadrant C (high power/low interest) of the power/interest matrix (Johnson and Scholes, 1997:198).

The policy and ideology that underpins skill formation in the UK reflects a market-based, supply-side approach designed primarily to reflect employers' concerns and fulfil employers' needs (Stuart, 2008). Stuart and Cooney (2004) argue that union involvement within genuine learning partnerships in the UK is undermined by a lack of commitment to real social partnership, reflected in an inadequate institutional framework. Consequently, even where learning partnerships emerge, this tends to be in response to crisis and to reflect short-term employer requirements (Wallis and Stuart, 2007). Furthermore, Warhurst et al. (2004) argue that the incentive for employers to move out of the low skills section of the economy is not evidenced. Despite this, the Leitch Report (Leitch, 2006), and the government's subsequent proposals, *World Class Skills: Implementing the Leitch review of skills in England* (DIUS, 2007) was viewed as cementing the central role of employer interests in driving training provision (Clough, 2007).

The union learning representative story appears to have been one of consolidation as opposed to expansion (Hollinrake et al. 2008). According to this research, over 90% of union learning representatives were operating in union-recognised workplaces. Also, the proportion of union learning representatives within the public sector had steadily increased from 28% in 2000 to 61.7% in 2005, with a corresponding decrease in the proportion within the private sector (although the overall number of union learning representatives in the private sector had increased). Furthermore, an increasing proportion of union learning representatives (76%) were to be found in larger organisations (with 1,000 or more

employees) as opposed to SMEs (7%) (TUC, 2006). From an employee relations' perspective Stuart (2008) defines the challenges to union learning representative activity in terms of four broad factors: missing membership; missing partner; missing demand for skills; and missing employer obligation. Stuart (ibid) argues that the problem of 'missing membership' refers to the fact that union learning and union learning representative activity tends to occur in union-recognised workplace settings. However, if union learning representative activity is to have a significant impact on either workplace learning or increasing union organisation, it has to reach beyond traditional trade union strongholds. More fundamentally, McIlroy (2008) questions the plausibility of any link between skills training and revitalisation without influential workplace trade unions.

Thus there may well be a new role for unions as service providers via the union learning representative initiative. The profile of union learning representatives was seen to be injecting new activists (Wallis et al., 2005; Moore and Wood, 2007). Union learning representatives do not necessarily identify themselves as union organisers. The ambiguity of the role of union learning representatives, in the union structures within which they operate sometimes hindered their integration into the branch structure (Wallis et al., 2005; Rainbird, 2005). Wallis et al. (2005) found that 'new activists' tended to be motivated by instrumental issues as opposed to a belief in union principles or a desire to extend union organisation. Hence, caution needs to be exercised before union learning representatives are cast as being instrumental in the pursuit of union renewal. It is acknowledged that they would need to strike a balance between employer demands for productive efficiency and the desire of employees for support to help them cope with the stress of modern working life, achieving mutual interest and common understanding (Rainbird, 2000a). Any initiative that was going to meet these criteria would have to be flexible enough to achieve 'best-fit' in local workplaces. A conflictual context can create uncertainty and suspicion over learning initiatives, which can restrict take-up, which, in turn, corresponds with Holden and Hamblett's (1998) reference to employees' perception that learning initiatives might just be 'management tricks', to meet employer demands for productive efficiency. It was claimed that the nature of collective bargaining and the positioning of learning and training in those frameworks could have a fundamental influence on the level of employee interest (Stuart, 1996; Findlay and Warhurst, 2010).

The data from the North - West region of England was analysed with reference to the nine activities (tasks) outlined by the PSHs in the union learning representative role descriptor

(TUC, 2004). The great majority of union learning representatives in the North-West of England are successfully completing activities 1: 2 and 9, see Table 31 and Table 32, in Chapter Seven. Activities one and two are linked to awareness raising and providing information, advice and guidance to members. A significant 80% of union learning representatives, however, reported that they get involved in monitoring the quality of learning and development provision and the progress of colleagues (activity nine). This confirms there is an opportunity for union learning representatives to be involved in evaluating the impact of learning and development opportunities, as discussed in Chapter Three on workplace learning (CIPD, 2006, CIPD 2010).

In respect of activity three, only 50% get the opportunity to work with their employer in identifying learning needs. It is suggested here that this is an activity where the legitimacy of union learning representatives to undertake this might be challenged in some situations (Cowen et al 2000, Poell, 2012a). Most union learning representatives can only aspire to task 4: ensuring equal opportunities for learning and development opportunities for members (UKCES, 2009), similarly with activity five, which refers to union learning representatives negotiating joint learning agreements with their employer. This would require mutual interest and a common understanding of the aims and objectives for workplace learning (Rainbird, 2000a) and the contribution union learning representatives could make, by the employer, union and members at the local level. Both activities four and five require the support of the local union branch, members and the local negotiating team. Thus in this instance the local branch occupies high power quadrant C or D of the power/interest matrix (Johnson and Scholes, 1997:198) as to whether or not these activities are facilitated. Chapter Four investigated literature on the role of unions in workplace learning and the development of the union learning representative initiative from the national level. The TUC were seen as a vehicle to introduce such practice into workplaces. Union learning was viewed as a key vehicle of workplace partnership and its ability or not to revitalise the trade union movement was discussed (Stuart and Cooney, 2004; Rainbird, 2003; Lloyd and Payne, 2006; Thompson et al., 2007). The employee relations literature discusses the impact of collective bargaining, learning agreements (Hoque and Bacon, 2006; Stuart and Robinson, 2007; Bacon and Hoque, 2008; Bacon and Hoque, 2010; Hoque and Bacon, 2011; Saundry et al., 2010). The nature of the employment relationship and employers' acceptance of the right for collective bargaining were seen to be crucial for the union learning representative initiative to be effective in the workplace (Saundry et al., *ibid*).

Activities six and eight (helping employers establish employee development schemes, and supporting innovative workplace development, such as Union Learning Fund projects) are only applicable to 20% of union learning representatives. In respect of these two activities the union learning representative model could encourage new ways of collaborating between actors to the HRD process (Poell, 2012b) and be a strategy to assist workers who support the learning of others (Evans et al, 2006). The opportunity for union learning representatives to participate in task 7, where union learning representatives are expected to establish and run learning centres, is declining over time. As reported by the LSC funding managers, trends suggest that as public funding for learning centres decreases so does employer facilitation of such resources.

Hence, this research has shown that the ability of union learning representatives to meet the expectation of their PSHs is mixed, but often their inability to do so is linked to a lack of co-operation by one of the other PSHs. The discussions in Chapter Three on workplace learning and Chapter Five on union learning representatives and NVET policy suggest that the UK's voluntarist approach to the implementation of NVET policy to encourage increased relevant workplace learning activity is having a minimal impact (Streeck, 1989; Ashton, 2004; Harrison, 2009; Westwood, 2004). There is a recorded history of the lack of impact of UK national vocational education and training (NVET) initiatives. According to Westhead (2004) the gap between what employers say and what they do is significant, so implementation of NVET initiatives is built on sand. The history of the shortcomings of employer provision in the post-1981, voluntarist era is summed up by Evans et al. (2006). In most UK work organisations, workers' learning is not a priority and tends to be a third order decision behind firstly marketing and competitive strategy and secondly work organisation and design (Evans et al., *ibid.*).

The discussion on unions and learning demonstrates the challenges and opportunities unions encounter in attempts to be part of the decision-making process in respect of learning and development opportunities in the workplace (see Costine and Garavan, 1995; Dundon and Eva, 1998; Holden and Hamblett, 1998; Thursfield and Hamblett, 2001). Further Rainbird (2000a) and Cowen et al (2000), report that there is a lack of employer support at the local level compared to the espoused views of senior management. This principle also appears to apply to variations in the espoused views of the affiliate unions at national and regional level to those sometimes demonstrated in practice at local branch level. There is even a distance at regional level between the decision makers in union

regional offices and regional union learn with the TUC to the actual union learning representatives. For union learning activity to happen, employers, in the local workplace, have to want to co-operate and individuals (union members and/or colleagues) have to want to participate. As Grugulis (2007) advises that participation lags behind support and employers and employees choose not to engage in it. The lack of employer participation in surveys that monitor and evaluate the union learning representative initiative, at both national and regional level, has meant that there is limited evidenced intelligence of their intent for the union learning representative initiative at local, workplace level. This study, did not gather data on issues related to individuals' participation.

Rainbird et al. (2004) suggest that, in respect of workplace learning, the workplace as a site of learning has to be understood in the power relations of the employment relationship. There is an assumption of a unitarist perspective to workplace learning when, in fact, where workplace learning occurs, the employer remains in control of the agenda (Felstead and Ashton, 2000 in Billet, 2001). So employers as a PSH are crucial to the implementation, development and sustainability of the union learning representative activity. The mapping of the PSHs onto Johnson and Scholes' (1997:198) power/interest matrix demonstrates that three fundamental PSHs, employers, unions and members and/or colleagues at local level, occupy quadrant C with high power and, from the evidence presented from the North-West region of England findings, often limited interest in the union learning representative initiative. Meanwhile the union learning representatives are the foot soldiers whose activity is the evidence against which opinions are formed as regards the extent to which union learning representative activity is meeting the expectations of its PSHs. Active union learning representatives occupy quadrant B (low power/high interest).

What emerges is that the facilitators and inhibitors to union involvement in workplace learning are the same as those identified in respect of workplace learning per se. Nevertheless, it is important not to underestimate the influence of the nature of the employment relationship within an organisation. The employment relationship can have a sizeable impact on how much support there is for workplace learning opportunities and activity. Employers have to gain the trust of the workforce and be open and honest about why training and learning and development activity is being encouraged in the workplace (Holden and Hamblett, 1998).

There is not a 'one size fits all' solution, it is a case of identifying best-fit for different situations (Evans et al., 2006; Grugulis, 2007). Given what is known and understood about

barriers to workplace learning, the tasks specified for an active union learning representative via the role descriptor (TUC, 2004) were too ambitious for a body of volunteer, lay officers to achieve. It was particularly ambitious to expect union learning representatives to provide a significant bottom-up impetus to encourage particularly hard-to-reach learners to engage in lifelong learning activity. As for where and for whom, learning opportunities are likely to be facilitated in the workplace, the impact of the occupational sector and context of the work situation also has an impact on the role of the union learning representative.

Other commentators present a more optimistic picture. Billet (2001) advises of the longstanding evidence of the efficacy of learning in the workplace. Wallis et al. (2005) found that union learning representative activity exhibits a degree of independence from managerial prerogative, with activity focused on broader notions of employability and the acquisition of transferable skills as opposed to employer driven concerns. Thompson et al. (2007) claim that the promise of employability acts as a magnet for new trade union members and strengthens links for union learning representative activity with existing members. Further evidence found employers linking union learning to improved staff retention and a cultural shift towards learning and development (Thompson et al. *ibid*). Plus employers placed value on basic transferable skills, such as improved language skills for migrant workers. In addition, Rainbird et al. (2004) suggested the acquisition of non-firm-specific skills may also provide benefits to the employer in terms of increased motivation, commitment and flexibility.

If the focus were to shift to what union learning representatives are able to practice in reality, rather than continuing to expect them to be able to carry out an unrealistic role profile, that PSHs in their own workplace do not support and/or facilitate, then the union learning representative role and workplace learning would be enhanced. The findings demonstrate that union learning representatives who are managing to practice their role can achieve significant outcomes and thus meet the expectations of some PSHs (Government, unionlearn, their union) but union learning representative activity has to achieve 'best fit' for its context.

The actual activities carried out by active union learning representatives, can provide useful helping activities (Harrison, 2009), to encourage learning networks in the work place (Poell and Van der Krogt, 2010). Poell (2012a) refers to the internal PSHs as actors, and presents the case that they need room to act according to their interpretation of structures, enabling

them to bring new impetus to HRD (human resource development) practice. Poell (ibid) also suggests that HRD's responsibility is to take account of both management's and employees' interests. As discussed in Chapter Three on workplace learning, Evans et al. (2006) advise that the creation of a learning community requires coaches, advisors, and mediators. These activities are reflected in the skills required to deliver tasks 1, 2 and 9 of the union learning representative role descriptor.

This thesis provides an alternative analysis of the union learning representative initiative to that of the employee relations perspective on the initiative. In doing so it offers a different insight into, and possible explanation for, the lower level of success than originally anticipated by the principal stakeholders. It has been identified that the Union Learning Representative role descriptor (TUC, 2004) was not a realistic expectation of what union learning representatives could achieve without the support and co-operation of the PSHs to the initiative. Employer attitudes to trade unions in the workplace and to workplace learning per se suggest that the union learning representative initiative was not going to be able to meet the expectations of its PSHs. This is consistent with workplace learning literature on employer and employee attitudes and behaviour in relation to learning. There are four key conclusions from considering the workplace learning literature. The first is the power of locally based employers and members/employees to the occurrence of workplace learning (Grugulis, 2007:3). Secondly, the identification within the literature of the contribution a 'helping role' could give to the encouragement and support of learners in the workplace (Van der Krogt, 1998, Evans et al 2006, Harrison, 2009, Poell and Van der Krogt, 2010, Poell, 2012b)). Thirdly, the influence of government, work context, occupational sector and employees on how workplace learning is or is not done. Fourthly, other national initiatives could be used to inform and support the union learning representative initiative e.g. Investors in People (IiP) (Ashton, 2004).

Mapping of the principal stakeholders onto the power/interest matrix Figure 7 below demonstrates the possible impact each stakeholder has been shown to have on the initiative. The matrix has been colour coded to demonstrate at which level of the corporate chain of governance (Johnson and Scholes, 1997) the PSH is operating at when they demonstrate that level of power/interest. The two way arrows demonstrate where these PSHs are likely to shift quadrants, depending on the power/interest demonstrated by another PSH.

Figure 7: Stakeholder Mapping: the power/interest matrix

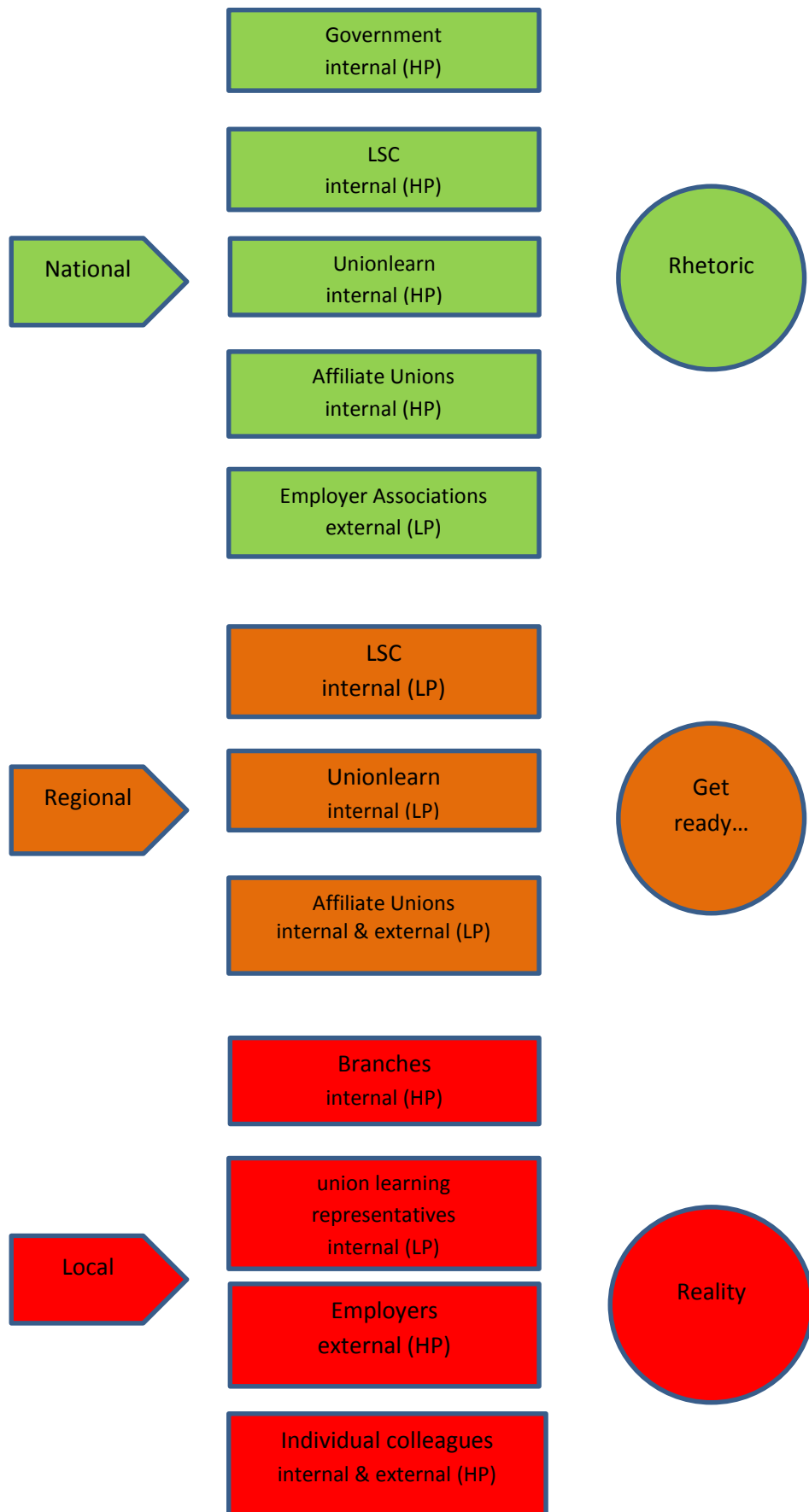
		Level of Interest	
		Low	High
Power	Low	A: minimal effort unions members/colleagues in-active union learning representatives	B: keep informed employer associations LSC unions unions members/colleagues active union learning representatives
	High	C: keep satisfied employers unions members/colleagues	D: key players Government TUC (unionlearn) unions

The chain of corporate governance (Johnson and Scholes, 1997:186), Figure 8 below, illustrates where there is resistance to the union learning representative initiative. The colour coding system illustrates their state of readiness to engage with the initiative. Internal and external labels have been applied to demonstrate whether they are internal to the union learning representative initiative, or whether they are an external PSH that is essential to facilitating the practice of union learning representative activity. Finally the level of their power, is indicated by being coded (HP) for high power) or (LP) low power).The only PSHs who are on 'Green for Go' are at national level and therefore have limited influence on PSHs at regional level illustrates why the union learning representative initiative is not meeting the expectations of its PSHs. The national level PSHs have even less influence on the activities of employers and members and/or colleagues at local level, where, it has been demonstrated, the local employer as the PSH often occupies quadrant C, high power/low interest of the power/interest matrix (Johnson and Scholes, *ibid.*). The voluntaristic approach to facilitating workplace learning has meant that the local employers, whose involvement is essential for the practice of union learning representative activity, were not included in the design of policy and implementation procedures for the union learning representative initiative, unlike other PSHs. For union learning activity to be

able to meet the expectations of its PSHS employers have to occupy quadrant D (high power/high interest).

The following chapter will offer a conclusion to the discussion and present what is claimed to be the contribution to knowledge from this research activity.

Figure 8: Chain of corporate governance for the union learning representative initiative adapted from Johnson and Scholes (1997:186)



Chapter 9: Conclusion, contribution and further research

The aim of the research project was to provide an informed response to the question:

To what extent is union learning representative activity meeting the expectations of its principal stakeholders?

At the start of this research the following objectives were set to achieve the aim.

Objectives:

1. To identify the principal stakeholders (PSHs) to the Union Learning Representative initiative from 1997 to 2008
2. To identify the intent of PSHs for the union learning representative initiative from an analysis of relevant PSHs' policy documents from 1997 to 2008
3. To investigate PSHs' expectations of the union learning representative initiative
4. To identify shifts in PSHs' expectations of the union learning representative initiative from 1997 to 2008
5. To provide a critically informed account of the extent to which those expectations have been met by the May 2010 general election

These objectives will now be revisited to assess the extent to which they have been achieved.

The response to each objective will be considered in turn.

1. To identify the principal stakeholders (PSHs) to the union learning representative initiative from 1997 to 2008.

This objective has been achieved. The PSHs to the union learning representative initiative were identified as the government, the TUC, employers, affiliate unions, members and/or colleagues, and to some extent union learning representative themselves. The literature on workplace learning (Rainbird et al., 2004; Evans et al., 2006) confirms that these categories can be considered as the stakeholders to workplace learning per se. It has been found that the PSHs have remained the same from 1997 to 2008, except for the government department and its agency that oversee the award of public funding for the Union Learning Fund (ULF). This role was provided by the TECs (Training and Enterprise Councils), on behalf of the Department for Education and Employment, from 1998 to March 2001. However, from April 2001 (following a reorganisation by the Department for Education and Skills, now the Department for Business, Innovation and Skills (BIS), this responsibility moved to the LSCs (Learning and Skills Councils). Since 2006 those funds have been managed and dispersed by unionlearn with the TUC.

2. To identify the intent of PSHs for the union learning representative initiative from an analysis of relevant PSHs' policy documents from 1997 to 2008.

This objective has been achieved. Not all PSHs however were involved in the design and inception of the initiative and as such did not create a policy document for the initiative. For those that did their intent has been identified. The intent of the government was for the union learning representative initiative to be a vehicle to increase workplace learning in the UK. The TUC's and to some extent the affiliate unions' intent for the initiative, was to strengthen union involvement in lifelong learning. As regards the employers, from a national perspective, the CBI (Aldridge, 2005) and CIPD (2004) both reported that union learning representatives had a crucial role to play in accessing hard to reach learners. The lack of participation of employers, in the monitoring and evaluation of the initiative to date, from both national and regional level, has meant that there is little evidence of their intent for the initiative.

Members and/or colleagues were not involved in the inception and design of the initiative and have not been surveyed as part of this research project. Union learning representatives' intent was decided by the Government, TUC and CBI and ultimately represented via the union learning representative role descriptor (TUC, 2004).

3. To investigate PSHs' expectations of the union learning representative initiative.

This objective has been achieved. Over all the evidence suggests that for PSHs the key to meeting their expectations of the initiative is their participation. The government are clear that the initiative should help further the lifelong learning agenda of UK NVET policy. The union learning representative role descriptor (TUC, 2004) demonstrates what the government, the TUC and the CBI expected union learning representatives to be doing in the workplace to contribute to achievement of the lifelong learning agenda. Ultimately achieving for workplace learning what health and safety representatives had done for safety in the workplace.

Expressions of interest from employer representatives (CBI and CIPD) provide some insight as to their expectations of the union learning representative initiative. The CIPD (2004) position paper is authored and produced by the CIPD, it also carries the logos for the Learning and Skills Council and the TUC. Thus the content appears to have been approved by both the funding body and the umbrella organisation for the trade unions. The extent to which its content represents the expectations of this employers' representative (the CIPD) is not clear. Nevertheless they published the document and thus it is assumed that they agree with it. The affiliate unions' expectation was that along with strengthening union

involvement in lifelong learning, the adoption of the initiative in the workplace would provide opportunities to strengthen the union via increased organisation and increased membership. When union learning representative activity is available to members there is evidence, as discussed earlier in this thesis, that sometimes their expectation is that a union learning representative can facilitate a 'wish list' of learning and development opportunities. This research suggests that individual union learning representatives commence their role with positive expectations of what they will be able to achieve in their workplace.

4. To identify shifts in PSHs' expectations of the union learning representative initiative from 1997 to 2008.

This objective has been achieved. There is no evidence that the TUC union learning representative role descriptor has been amended since 2004 (TUC, 2004). As such it represents the published expectations of the Government, TUC and employers at national level. PSHs need to appreciate the reality of the scope of the union learning representative role. Thus it would have been useful if there had been a shift in some of their expectations, via a review of the union learning representative role descriptor, as the role evolved. At local level, there is evidence that as individual union learning representatives experience inhibitors to their activity their expectation of what they can achieve in the workplace declines. Likewise if the expectations of members and/or colleagues are not met their expectation of the initiative is decreased.

5. To provide a critically informed account of the extent to which those expectations had been met by the May 2010 general election.

This objective has been achieved. At national level, as a vehicle for the implementation of aspects of the Government's NVET policy, the evidence suggests that the UK's voluntarist approach to the implementation of NVET policy to encourage increased relevant workplace learning activity is having a minimal impact. As reported earlier in this document, the Government and unionlearn with the TUC target for there to be 22,000 trained union learning representatives in England by 2010 was achieved.

The TUC and the affiliate trade unions at national, regional and local level encounter challenges as well as opportunities in their attempt to be part of the decision-making process in respect of learning and development opportunities in the workplace. The employers' response to the initiative is positive at national level but at local level this critical PSH is often reported as inhibiting rather than facilitating union learning representative activity. Members and/or colleagues at the local level are also reported as

sometimes inhibiting rather than facilitating union learning representative activity. A key issue that has been identified is that the union learning representative role descriptor, drawn up by the TUC and the CBI (TUC, 2004), does not represent what union learning representatives are actually doing. As regards the union learning representative community, the fundamental finding is that the majority of them can only fulfil three of the nine activities on their role descriptor. The power/interest dynamic, including the nature of the employment relationship within the local workplace dictates what type and level of activity a union learning representative is able to practice. PSHs need to be realistic as regards the scope of the union learning representative role in the reality of the workplace.

Thus in response to the research question, from the evidence presented union learning representative activity has met some of the expectations of its PSHs. Where there is a shortfall this has been found to be linked to the position of critical PSHs on the stakeholder mapping power/interest matrix (Johnson and Scholes (1997:198) and the distance between the architects of the initiative at national level and the implementers at local level. This is demonstrated via application of the chain of corporate governance (Johnson and Scholes *ibid*:186).

The Golden Thread

In conclusion to the discussion of the aim and objectives for this research, the application of power/interest matrix (Johnson and Scholes, *ibid*:198) and the corporate chain of governance (Johnson and Scholes, *ibid*:186) provides a golden thread to illustrate the position of PSHs as defined by the findings from this research.

Figure 9, below presents the stakeholder mapping of the PSHs via the power/interest matrix. It has been colour coded as in the previous presentations of the corporate chain of governance:

Green = national level

Amber = regional level

Red = local level

The positioning of the PSHs is as follows.

At national level:

The government and unionlearn with the TUC occupy quadrant D (High power/high interest). The employers and affiliate unions occupy quadrant B (low power/high interest).

At regional level:

The Government agencies and unionlearn with the TUC are presented as occupying quadrant D (high power/ high interest) as they have the authority over where funding goes within the region to support the union learning representative initiative. The presence of the employers at regional level are not represented in respect of the initiative. The LSCs advised they do not have direct contact with the employers. The affiliate unions occupy either quadrant D (high power/high interest) or C (high power/low interest) as they facilitate access to workplace branches for unionlearn with the TUC.

At local level:

The government and unionlearn with the TUC occupy quadrant B (low power/high interest) as neither have any jurisdiction over what occurs in local workplaces in respect of the union learning initiative. The affiliate unions are presented as occupying either quadrant B (low power/high interest) or quadrant A (low power/low interest) as at local level the extent of their involvement in union learning representative activity is subject to access facilitated by the local employers. Thus at local level employers and members might occupy either quadrant C (high power/low interest) or quadrant D (high power/high interest). Union learning representatives occupy either quadrant B (low power/high interest) or A (low power/low interest) as they are dependent on the facilitation of their activity by their employer and their branch plus they require the buy-in from their members to participate in workplace learning facilitated by union learning representative activity. Union learning representatives report that they are keen for networks and forums at local level.

Figure 9: Stakeholder Mapping: Summary

		Level of Interest	
		Low	High
Power	Low	A: minimal effort unions in-active union learning representatives	B: keep informed Unions employer representatives employer representatives Government TUC (unionlearn) unions active union learning representatives
	High	C: keep satisfied unions employers members and/or colleagues	D: key players Government unionlearn with the TUC LSC unionlearn with the TUC unions employers members and/or colleagues

This representation suggests that there is work to be completed by the government and unionlearn, at all levels, to achieve occupation of the high interest quadrants B or D, at local level, by all PSHs. Union learning representative activity as part of workplace learning is dictated by the power of local level employers to facilitate it or not. The critical status of employers and members and/or colleagues at local level must be acknowledged and the need for these two PSHs to be kept satisfied by their experience of the initiative recognised.

Contribution to Knowledge and Practice from This Research

This research has identified what union learning representatives in the North-West region of England are able to do in the workplace compared to the union learning representative role descriptor (TUC, 2004). This has identified that the PSH expectations of the union learning representative activity were unrealistic in some dimensions.

Previous national studies of union learning representative activity in England have focussed on the union learning representative initiative as a vehicle for organising and raising the profile of trade unions in the workplace. The nature of the employment relationship and the inclusion of learning and development in the collective bargaining framework were presented as what had to be achieved to encourage union learning representative activity.

This piece of work has analysed the union learning representative initiative and its activity in the North-West region of England through the lens of a body of literature concerned with workplace learning. The facilitators and inhibitors identified in the workplace learning literature are the same as the facilitators and inhibitors identified in the employee relations based reports of the union learning representative initiative. Some of these inhibitors are also PSHs to the initiative.

Comparison of the findings to the workplace learning and learning and development literature has identified that the activities union learning representatives get involved in are the 'helping' type activities and some aspects of monitoring and evaluation. The tasks they do not get involved in are the more strategic, business level decision making activities and activities related to the learning and development process.

There is a mismatch between what was perceived by national level PSHs as to what the union learning representative activity should be, and, the reality of union learning representative activity at the local level. It is claimed here that the distance, as demonstrated via the corporate chain of governance (Johnson and Scholes, 1997:186), from the architects at national level to the implementers at local level has a profound impact on the ability of PSHs at national and regional level to understand the reality at local level.

The application of the power/interest matrix has identified where the power sits in the facilitation of union learning representative activity and where the power sits when union learning representative activity is inhibited. The power/interest matrix revealed issues that facilitate and/or inhibit activity not only inter PSHs but also intra PSHs. Union learning

representatives are in two PSH groups, as a lay officer of the local level branch and as an employee at the local level workplace. There are therefore two other PSHs that dictate which activities will be facilitated in the branch and in the workplace, their union and their employer.

A further contribution to knowledge by this piece of research is that in respect of the union learning representative initiative the in-depth monitoring that has been completed via national surveys has only sought the opinions and experiences of union learning representatives. As this research has identified the fundamental PSHs to get on side for any initiative to encourage workplace learning activity, are the employers and the employees and/or members. There has been no significant monitoring of these two PSH groups. As identified in chapter seven, monitoring, the fifth stage of Hining's model is often ignored or done badly within organisations (Stewart, 1996:32).

Areas for Further Research

The research presented in this thesis is the most extensive piece of research that has been carried out into Union Learning Representative activity within the North-West region of England and similar in-depth evidence does not exist for any other of unionlearn with the TUC's regions in England. Thus it could be replicated in other regions to test the findings. Its weakness however relates to employers and members/employees as PSHs. The paucity of responses to the employer survey as part of this research is a weakness of this project. Thus once again there has been no meaningful monitoring and evaluation of the employer experience of the union learning representative initiative. Further no employee opinions have been gathered from members on the receiving end of union learning representative activity.

The key problem remains however, how can employers and their representatives be encouraged to move from occupying quadrant C of the power/interest matrix (Johnson and Scholes, 1997:198), where they have high power but low interest, to quadrant D, high power and high interest. Likewise members and /or colleagues need to be encouraged to move from quadrant A, (low power/low interest), to at least quadrant B, (low power/high interest). Further research as part of the monitoring process should be completed for all PSHs. In an attempt to achieve a valid response rate data collection methods would have to be more inventive and creative than self-reporting surveys as used in this project. In order to be able to gather opinion and experience from employees the researcher would have to gain access via the employer. This suggests that access to employers should be attempted

via their representative organisations in the first instance; that is regional and local based branches of organisations such as CBI, CIPD, the Federation of Small Businesses, and Chambers of Commerce. All PSHs require the opportunity to share their reality of the union learning representative initiative and its activity. From such monitoring and evaluation activity meaningful action can be taken to encourage union learning representative activity that meets their expectations.

Research that monitors the evolution of the union learning representative role would enable unionlearn with the TUC to evaluate and review the role descriptor to ensure its relevance to the reality of the union learning representative experience. This would enable realistic targets to be set for the outcomes from the union learning representative initiative at national, regional and local level. This should then improve the legitimacy of the role from the perspective of all PSHs.

Union learning representative activity is meeting the expectations of its PSHs to some extent but the framework for the initiative needs to develop to reflect the reality of the activity. This does not however suggest that this alone would address the contradictory and conflicting objectives and interests between members of a pluralistic employment relationship.

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Appendices 1-12: Methodology

Appendix 1: Research Bid

Research Bid

To: TUC North West Region

From: Lancashire Business School

University of Central Lancashire

This bid has been drawn up as a result of the meeting between Dave Eva, Tony Bennett and the Business School and follows a further meeting and a number of phone calls between Alison Hollinrake and yourselves.

This document has been drawn up by Alison as the basis for further discussion.

Contact can be made with ahollinrake@uclan.ac.uk or pfrimston@uclan.ac.uk

Research Element 1: Baseline

Aim:

To identify the extent of Union Learning Representative (ULR) activity within the region at a given point in time.

Objectives:

1. To gather statistical data on the number of ULRs within the region by union and by employment sector.
2. To gain insight as to why or why not individuals choose to become ULRs
3. To identify the level and source of ULR training completed by these ULRs

4. To identify issues that enhance and inhibit ULR activity. For example impact of legislation (April 2003) regarding paid time off to fulfil ULR duties and activities, support for ULR activity within the workplace. Level of resource allocation to support ULR activity: time, budget, forum for discussion.
5. To identify the nature and level of workforce development programmes that have been provided as a response to ULR activity at branch and employing organisation level.
6. To establish the number of learners that have enrolled, progressed and/or completed these workforce development programmes.
7. To identify how ULR activity can support the objectives of other agencies in the area of Workforce Development e.g. Northwest Development Agency, Learning and Skills Councils.
8. To investigate resources that are available from such agencies in support of building the capacity of ULR activity within the Northwest region.
9. To present the findings of these investigations in database format to the TUC Northwest Region representing the situation at a given point in time that can be maintained and updated by evidence drawn from the resulting monitoring system (Research Element 3).

Methodology:

Rationale -

In order to gather relevant data to identify the baseline of ULR activity and its impact on Workforce Development it is suggested that quantitative data collection methods (postal questionnaires) would, in the main, be most appropriate. These would be distributed to a random sample across a sample frame of Northwest Region, union members. Following initial analysis of the findings qualitative methods such as Focus Groups, semi-structured interviews will be completed with a relevant sample of the initial sample frame to further investigate initial findings. As regards data collection from other appropriate Agencies, this would entail initial contact being made by telephone and where appropriate, further investigation of issues with appropriate representative(s), at their location, via semi-structured interview with a member of the research team. All methods will be appropriately piloted and evaluated for their effectiveness, prior to going live with the full sample.

1. Access and interrogate data currently held on the TUC Northwest Region database. (Objective 1)
2. Make contact and arrange data collection interviews with appropriate representatives from the following Northwest Development Agency offices:

HQ and Cheshire Office

Merseyside Office

Greater Manchester Office

Lancashire Office

Cumbria Office (Workington) – subject to confirmation that this office is appropriate to TUC Northwest Region activity.

(Objective 7 & 8)

3. Make contact and arrange data collection interviews with appropriate representatives from the following Learning and Skills Councils' Workforce Development teams:

Greater Merseyside

Greater Manchester

Lancashire

Cumbria }

}subject to confirmation that this office is appropriate }to
TUC Northwest Region activity.

Cheshire and Warrington }

(Objective 7 & 8)

4. To issue a postal questionnaire to all existing ULRs from the existing TUC Northwest Region database.
(Objectives 1, 2, 3, 4,5,6)
5. To issue a postal questionnaire to all TU Branches within the TUC Northwest Region.
(Objectives 1, 2, 3, 4,5,6)
6. To issue a postal questionnaire to an appropriate sample of TU organised, employing organisations within the TUC Northwest Region.
(Objectives 1, 2, 3, 4,5 6)

7. To develop and present database of the collated information from the investigations detailed in 1-5 above.
(Objective 9).

The costings related to this methodology are detailed in the spreadsheet attached to this email. Once the existing TUC North West Region database has been interrogated and relevant data captured then true figures of ULRs, Branches and TU organised employing organisations that need to be included in the survey can be established.

Outcomes:

Production of the database from the data collected will provide a sound platform for the planning and design of methodologies to investigate the following:

Research Element 2: Barriers

Research Element 3: Monitoring System Design

Chronologically it is suggested that Research Element 3 is then completed to establish a robust Monitoring system to enable regular updating of the database.

As detailed in objective 4 above, an initial identification of Barriers and Enhancers to effective ULR and Workforce Development activity will be gathered from this investigation. However it is anticipated that this issue will merit further investigation following this identification and presentation of a baseline of ULR activity within the Northwest Region.

Alison Hollinrake
July 2003

Appendix 2: Phase One DW & PW Interview Schedule

Phase One DW and PW semi structured interviews:

The questions designed to investigate the role of the Development Workers in the region were:

Proposed Agenda:

1. Outline of your role.

Performance objectives?

Designed to gather data against objectives 1 & 3

2. How your role fits into Learning Services in the North West Structure

Designed to gather data against objective 2

3. Previous Office(s) held

Designed to gather data against objective 3 & 4

4. Link to Project Workers

Team list/overview of team

Designed to gather data against objectives 2 & 3

5. Issues that support you achieving the objectives of your role

Designed to gather data against objective 1:2:3:4

6. Any barriers that inhibit the achievement of your objectives?

Designed to gather data against objectives 1:2:3:4

7. Your opinion as regards ULR activity.

Effectiveness in encouraging workforce development

Contribution to Learning Services' objectives

Barriers to ULR activity within the workplace

What are/would be reasonable measures of success of ULR activity

Designed to gather data against objectives 1:3:4

8. Issues I should be aware of in completing this research in your area?

Designed to gather data against objective 5

9. Any other comments?

Designed to gather data against objective 5

Prepared by Alison Hollinrake – October 2003

Project Worker Interview Schedule

Proposed Agenda: (Objectives as for Development Worker schedule)

1. Outline of your role.

Performance objectives?

Designed to gather data against objectives 1 & 3

2. How your role fits into Learning Services in the North West Structure

Designed to gather data against objective 2

3. Previous Office(s) held

Designed to gather data against objective 3 & 4

4. Link to your Regional Development Worker

Designed to gather data against objectives 2 & 3

5. Tell me about how you work with your ULRs

(Initial contact through to post-training)

Can you supply me with a list of the ULRs and the organisations you work with?

Designed to gather data against objective 1:3:4:5

6. Issues that support you achieving the objectives of your role

Designed to gather data against objective 1:2:3:4

7. Any barriers that inhibit the achievement of your objectives?

Designed to gather data against objective 1:2:3:4

8. Your opinion as regards ULR activity:

Effectiveness in encouraging workforce development

Contribution to Learning Services' objectives

Barriers to ULR activity within the workplace

What are/would be reasonable measures of success of ULR activity

Designed to gather data against objectives 1:3:4

9. Issues I should be aware of in completing this research in your area?

Designed to gather data against objective 5

10. Any other comments?

Designed to gather data against objective 5

Appendix 3: Actual Interview Schedules

TUC Northwest Region

Union Learning Rep. Baseline Research Project

Investigative Discussion(s) with Development Workers (Regional Post holders).

Proposed Agenda:

1. Outline of your role.
Performance objectives?
2. How your role fits into Learning Services in the North West Structure
3. Previous Office(s) held
4. Link to Project Workers
5. Team list/overview of team
6. Issues that support you achieving the objectives of your role
7. Any barriers that inhibit the achievement of your objectives?
8. Your opinion as regards ULR activity.
 - a. Effectiveness in encouraging workforce development
 - b. Contribution to Learning Services' objectives
 - c. Barriers to ULR activity within the workplace
 - d. What are/would be reasonable measures of success of ULR activity
9. Issues I should be aware of in completing this research in your area?

10. Any other comments?

Prepared by Alison Hollinrake – October 2003

Contact can be made with Alison:

by 'phone: 01772 894781 or 07811 025 355

email: ahollinrake@uclan.ac.uk

TUC Northwest Region
Union Learning Rep. Baseline Research Project

Investigative Discussion(s) with Project Workers.

Proposed Agenda:

1. Outline of your role.
Performance objectives?

2. How your role fits into Learning Services in the North West Structure

3. Previous Office(s) held

4. Link to your Regional Development Worker

5. Tell me about how you work with your ULRs
(Initial contact through to post-training)

Can you supply me with a list of the ULRs and the organisations you work with?

6. Issues that support you achieving the objectives of your role

7. Any barriers that inhibit the achievement of your objectives?

8. Your opinion as regards ULR activity:
 - a. Effectiveness in encouraging workforce development
 - b. Contribution to Learning Services' objectives
 - c. Barriers to ULR activity within the workplace
 - d. What are/would be reasonable measures of success of ULR activity

9. Issues I should be aware of in completing this research in your area?

10. Any other comments?

Prepared by Alison Hollinrake – October 2003

Contact can be made with Alison:

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email: ahollinrake@uclan.ac.uk

Appendix 4: S1 ULR Questionnaire

Design Decisions in addition to York Consultancy 2003 National ULR Survey

Section:	Gather data against objective 1 and /or 2	Notes:
<p>1: You and your workplace</p> <p>Q10</p> <p>Q11</p>	<p>1 & 2</p>	<p>Requests for biographic details were set in section one, the 2003 survey asked for these details in its final 'About You' (AY) section. My reasoning for asking these questions at this stage was that it started the response process by asking people for information they would know. Hopefully this would build their confidence to continue and complete the questionnaire.</p> <p>New question – 'sector that best describes the nature of your workplace' had not been included in the 2003 survey. This was identified as being a crucial question in response to objective 1. The standard industrial categories (SICs) from the Office for National Statistics (ONS) were used (accessed 24 October 2003).</p> <p>New question to enhance the data in Q10 above.</p>

<p>2: Becoming a ULR</p> <p>Q13</p> <p>Q15</p> <p>Q16</p> <p>Q17</p>	<p>2</p>	<p>New question, concerned with impact of length of time in the role.</p> <p>Does this enhance performance?</p> <p>New question to track changes in unions methods of selecting ULRs. Insight to the extent to which the ULR role was being acknowledged in unions' rule books.</p> <p>New question to identify what was encouraging new activists into the role.</p> <p>Similar question in final (AY) section of 2003 survey. Second section was to identify if becoming a ULR had caused reps to resign from other union roles.</p>
<p>3:</p> <p>ULR Training</p>	<p>2</p>	
<p>4:</p> <p>ULR activity in the workplace</p> <p>Q22</p> <p>Q23</p> <p>Q24-26</p> <p>Q27-28</p>	<p>1 & 2</p>	<p>This was to identify ULRs' own definition of the role and its responsibilities.</p> <p>This was in the final (AY) section of the 2003</p> <p>This was a new question to identify sites where there was joint union recognition.</p> <p>These were a variation of Q7 in the 2003 survey. Again this was to identify what individual ULRs opinions were of their activity and what colleagues wanted from their ULR.</p>

Support for ULR activity		
Q29		This new question aimed to identify the extent to which ULRs were benefitting from the April 2003 Statutory Rights for ULRs.
Q33		The 2003 survey asked ULRs if they wanted further support in these areas and who from: union, employer, TUC or other. This question aimed to provide insight as to how ULRs were being supported in their own branch.
Q34		Is an enhanced version of Qs 30 a&b in the 2003 survey. This was to give unionlearn evidence of where ULRs required further support to overcome barriers in the workplace.
Q36		
ULR Activities		
Q43-46		These questions were included as record keeping by ULRs was seen as crucial to enable meaningful feedback to unionlearn on the nature and extent of ULR activity. Unionlearn have to provide robust evidence of activity to the LSC to justify funding. This question was to get ULR opinion of the impact of their activity.
Q 47		Aimed to record ULR opinion as to their future aims for the role and their view of its sustainability.
Q48		

		A major omission at this stage of the questionnaire design was the opportunity for ULRs to record their ethnic origin.
--	--	--

TUC Northwest Region

Union Learning Rep. Baseline Research Project

DRAFT QUESTIONNAIRE

Section 1: You and Your Workplace

1. Your Name:

2. Age:

3. Sex:

4. Job Title:

5. Length of service

6. Do you normally work
Full time/Part-time

How many hours do you work per week, on average

Do you work shifts/anti-social hours

7. Which Union are you a member of?

Workplace

8. Is your workplace:
- Public Sector
 - Private Sector
 - Voluntary Sector
 - Don't know

9. Workplace address

10. Which sector best describes the business of your workplace?

Agriculture etc	Mining, Electricity, Gas etc
Engineering	Manufacturing
Construction	Distribution, Hotels and Catering
Transport	Communications
Financial & Business Services	Public Administration
Defence	Education
Health	Retail
Broadcasting	Other services

11. What does your workplace produce/deliver?

12. Number of employees
- a) on your site
 - b) in your workplace

Section 2: Becoming a ULR

13. Your length of service as ULR

14. How did you become interested in being a ULR?

Another Learning Rep

Employer

TUC

Union Officer/Senior Rep

Other

15. Were you nominated to become a ULR

Did you volunteer to become a ULR

Other (Please state)

16. What attracted you to the role?

17. Which, if any, of the following Union functions did you carry out before you were a ULR?

None	
Steward	
Health & Safety Representative	
Convenor	
Equal Opportunities Representative	
Organiser	
Other function (please state)	
Branch Office role (please state)	

18. Do you currently have other Union Function responsibilities?

Steward	
Health & Safety Representative	
Convenor	
Equal Opportunities Representative	
Organiser	
Other function (please state)	
Branch Office role (please state)	

Section 3: ULR Training

Detail to be gathered from Peter Holland 17.10.03

19. Did you receive training to become a ULR?

Yes/No

20. Did you attend all the training
Yes/No

If not, Why?

21. Did you complete the training?
Yes/No

If not, Why?

ALSO SEE Q 8 on YC

Section 4: ULR activity in the workplace

22. Describe your role and responsibilities as a ULR

23. Are you aware of other ULRs within your workplace?
Your union?

Yes/No

How many

Other unions?

Yes/No

How many?

24. Which other Unions are represented by ULRs in your workplace?

25. Number of Union members you represent in your workplace

26. Please list all other Unions that are represented within your workplace

27. Have you had the opportunity to practice ULR activity since you completed your training?

Yes

In what ways?

What do people most often come to you for?

No

Why not?

28. Have other non-union colleagues used you in your role as a learning rep ?
Yes/No

If yes: in what way?

Support for ULR activity:

29. Do you get paid time to fulfil ULR duties?
How much

Frequency

30. Do you give unpaid time to ULR activity?
How much

Frequency

Arrangements that support your ULR role:

31. In the Workplace:
Employer/Union learning Agreement

Yes/No

If yes, when was this agreement accepted?

Committee

Yes/No

If yes, how often does this committee meet?

Who attends this committee and what is their job title?

32. Other informal arrangements (please provide details)

33. What resources are you given to help you fulfil your ULR role within the workplace?
Please tick which apply to you:

Time	<input type="checkbox"/>	computer access for email/internet	<input type="checkbox"/>
office	<input type="checkbox"/>	learning resources	<input type="checkbox"/>
telephone	<input type="checkbox"/>	learning centre	<input type="checkbox"/>
network	<input type="checkbox"/>	Other (please state)	
Admin.support	<input type="checkbox"/>		

Are these resources adequate? *(rate on likert scale)*

34. Access to TUC Project Worker
(rate on likert scale)

In your Branch:

Committee

Yes/no

Informal arrangements

Yes/no

If yes, please give detail

35. Have you attended ULR events provided by TUC Learning Services?

Yes/No

If yes:

How Many

Was the event(s) useful?

Why?

Details of any other arrangements that support your ULR activity?

36. Barriers that inhibit your ULR role:

In the Workplace:

Lack of Employer/Union learning Agreement

Lack of Committee, informal arrangements (give detail)

Lack of Resources to fulfil your ULR role

Time		computer access for email/internet	
office		learning resources	
telephone		learning centre	
network		Other (please state)	
Admin support			

Lack of access to TUC Project Worker

Why?

Branch

Lack of support for ULRs

Please provide brief details of any other issues that are barriers to your ULR activity?

37. ULR Activities

See 9a on York Consulting

38. Do you get involved in assessing the needs of learners in your workplace?
Yes/No

39. Have you undertaken a learning needs assessment at your workplace?
Yes/No

40. If yes, how have you assessed learning needs?

Formally		Informally	
Survey		Ad-hoc meetings	
Via formal meetings		'in passing'	
Arranged one to one discussions with colleagues			
Other (please state)		Other (please state)	

If no, who assesses learning needs within your workplace?

How is this done?

41. Once identified, are learning needs addressed within your workplace?
Always/sometimes/ never

42. How many of your colleagues have you assisted to get training and development opportunities in your workplace?

43. Do you keep records of contacts with colleagues?
Always/sometimes/never

44. Format of these records:
Please state:

45. Do you monitor the progress of colleagues on Training and Development programmes?

Always/sometimes/never

46. If yes, how is this done?

Formally		Informal	
De-brief		Discussion	
Filling in a form			
Other (please state)		Other (please state)	

47. To date, what has been your biggest success as a ULR?

48. In the longer term what would you like to achieve as a ULR?

For colleagues:

What will support achievement of this?

What may prevent you achieving this?

For you as an individual:

What will support achievement of this?

What may prevent you achieving this?

49. Do you have to provide reports on your ULR activities?

Yes/No

If yes,

50. Who do you report your ULR activities to?

Nature of this reporting

Formal

How is this done?

Informal

How is this done?

Thank you for taking the time to complete this survey.

Please return to Alison Hollinrake at the University of Central Lancashire in the pre-paid envelope by ?? November 2003.

Pleas call Alison on 01772 894781 if you have any questions or want to talk further about any aspect of your work as a Union Learning Rep.

Your responses will be treated in the strictest confidence and will only be seen by members of the Research Project Team. Under no circumstances will there be any disclosure of information to third parties.

ULR S1 Revision 1

Section & question	Revision
NB: the section and question numbering is inconsistent at this stage.	
<p>1. Personal and Workplace Details:</p> <p>1.1</p> <p>1.2</p> <p>1.4</p> <p>1.6</p> <p>1.8</p> <p>1.9</p>	<p>Add 'Name and Address of workplace'</p> <p>Re-number 4 elements of 1.1 to individual questions to facilitate cross reference of responses to details on unionlearn database. Also to enable coding for data entry to SPSS for renumbered 1.2 and 1.3.</p> <p>Insert time variables, by years</p> <p>Insert age variables</p> <p>Insert time variables, by hours</p> <p>Move up to 1.3</p> <p>Insert sector variable</p>
<p>Section 8 (2): Becoming a Union Learning representative (ULR)</p> <p>2.1</p> <p>8.16 (3)</p> <p>Add new question</p>	<p>0-1 year variable introduced</p> <p>insert 'you'</p> <p>to identify what the role is called by the respondent's organisation and trade union. (variables: ULR, Learning Rep, Learning Advocate)</p>
<p>Section 3: ULR Training</p> <p>After 3.1.</p>	<p>Copy over Qs 4,5,&6 from this section on the York Consultancy (2003) questionnaire.</p> <p>To identify which organisation provided the training, its duration and level of satisfaction with the initial training.</p> <p>Insert 'course for learning reps' variable.</p>

8.16 (3)	
<p>Section4: ULR Activity in the Workplace</p> <p>4.2 – 4.4</p> <p>4.7</p> <p>8.16</p>	<p>Wording amended to make questions more polite/respectful, to encourage people to respond to them.</p> <p>Numeric variable added</p> <p>Wording amended to limit ambiguity as to what response the question is seeking.</p>
<p>Section5: Support for Union Learning Representative Activity</p>	<p>8.16 to 8.16 (2) Questions have been extended to encourage response. Variety of tick box and open, qualitative questions. .</p>
<p>Section 6: Arrangements that support your union learning representative role</p> <p>1.3 & 8.16</p> <p>8.16</p> <p>8.17</p> <p>8.18</p> <p>Link 8.19.to 8.16</p> <p>6.11</p>	<p>Amend term of reference from 'committee' to 'working group' as this is the term used by unionlearn.</p> <p>Insert frequency variable.</p> <p>Delete</p> <p>Reword to make this a direct question to the respondent.</p> <p>Likert scale (Oppenheim,1998:196) inserted to rate satisfaction with resources.</p> <p>Insert quantity variable</p>
<p>Section 9: Barriers that inhibit your union learning representative role</p> <p>8.16</p>	<p>Additional variable added and wording amended to reduce ambiguity and identify as a barrier. e.g 'Office' to 'lack of office space'</p>
<p>9: Union Learning Representative Activities</p> <p>9.16</p>	<p>Insert activity variables, selection copied from Q9a, York Consultancy (2003) survey.</p>

<p>8.4</p> <p>8.8</p> <p>8.10</p> <p>8.12</p> <p>Page 9:</p> <p>8.16 (reports)</p>	<p>Confirmed by description of ULR activity given in Wiseman:1998 article.</p> <p>Wording amended to reduce ambiguity.</p> <p>Insert quantity variable</p> <p>Wording amended to 'soften' the request</p> <p>Wording amended to soften the request.</p> <p>'formally' & 'informally' to become headings.</p> <p>Qs related to achievements, longer term aims, format to be reviewed and all moved to end of survey.</p> <p>Moves up</p>
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ULR S1 Revision 2

Section & question	Revision
NB: the section and question numbering is inconsistent at this stage.	
<p>1 PERSONAL AND WORKPLACE DETAILS</p> <p>1.10</p> <p>1.11</p>	<p>Reword to: 'Is there shift working at your workplace?'</p> <p>New question: 'What shift patterns exist...' insert shift variable.</p>
<p>9 BECOMING A UNION LEARNING REPRESENTATIVE (ULR)</p> <p>2.1</p> <p>2.5</p>	<p>Reduce time variable options. 7-13+ years unrealistic,</p> <p>Delete</p>
<p>2 UNION LEARNING REPRESENTATIVE (ULR) TRAINING</p> <p>9.3</p>	<p>Add 'Other...' option</p>
<p>9 UNION LEARNING REPRESENTATIVE (ULR) ACTIVITY IN THE WORKPLACE</p> <p>4.1</p> <p>After 4.7</p> <p>Page 4 Q9.2</p> <p>Q4.12</p> <p>Q9.2(2)</p>	<p>Delete</p> <p>Insert new 4.8. Cut and paste from page 6 Q9.2. Additional variable given by unionlearn with the North West TUC. The activities and wording of these were informed by the evidence the Learning and Skills Council (LSC) required from TUC Learning services as evidence of activity for output evidenced funding.</p> <p>delete</p> <p>delete</p> <p>insert 'if any' after 'colleagues'</p> <p>insert activity variable</p> <p>cut and paste assessing learning needs battery of questions from P6 to P8 Q9.3</p>

<p>6 ARRANGEMENTS THAT SUPPORT YOUR UNION LEARNING REPRESENTATIVE ROLE</p> <p>P5 Q9.2</p> <p>Insert new question</p>	<p>Reword to: 'How satisfied are you with the support from the TUC/own union? More effective question than just asking re: support from Project Worker. Also unfair to identify individual Project Workers and assess their performance in this way.</p> <p>'What additional support would you like to receive?'</p>
<p>9: UNION LEARNING REPRESENTATIVE ACTIVITIES</p> <p>8.10</p>	<p>Provide tick box response option x 2 variables:</p> <p>Paper: electronic</p>

ULRQuestionnaire2 15.12.03

UNIVERSITY OF CENTRAL LANCASHIRE

TUC NORTHWEST REGION

BASELINE RESEARCH PROJECT

UNION LEARNING REPRESENTATIVE

SURVEY 2003

Please indicate your response by crossing one box per question, unless otherwise specified. There is an opportunity to add your own comments at the end of the questionnaire.

Please complete and return to:

**The Survey and Research Unit
Strategic Development Service
University of Central Lancashire**

Preston

PR1 2HE

by

XXXXXXXX 2003

1 PERSONAL AND WORKPLACE DETAILS

1.1 YOUR NAME:.....

1.2 JOB TITLE:

1.3 UNION YOU BELONG TO

1.4 NAME AND ADDRESS OF WORKPLACE.....
.....
.....

1.5 How long have you worked in your present role? 1-3 years 4-6 years
7-9 years 10+ years

1.6 Are you Female?
Male?

1.7 How old are you? 16-21 26-35 46-55
22-25 36-45 56+

1.8 Do you work Full Time?
Part time?

1.9 On average, how many hours do you work per week?

1-10 hours	<input type="checkbox"/>	31-40 hours	<input type="checkbox"/>
11-20 hours	<input type="checkbox"/>	41-50 hours	<input type="checkbox"/>
21-30 hours	<input type="checkbox"/>	50+ hours	<input type="checkbox"/>

1.10 Do you work shifts/ anti-social hours?

Yes

No

1.11 Is your work place

Public Sector?	<input type="checkbox"/>	Private Sector?	<input type="checkbox"/>
Voluntary Sector?	<input type="checkbox"/>	Don't know	<input type="checkbox"/>

9.2 Which sector best describes the nature of your workplace?

Agriculture & Fishing	<input type="checkbox"/>	Transport & Communications	<input type="checkbox"/>
Energy & Water	<input type="checkbox"/>	Banking, Finance & Insurance	<input type="checkbox"/>
Manufacturing	<input type="checkbox"/>	Public administration, Education & Health	<input type="checkbox"/>
Construction	<input type="checkbox"/>	Other (Please specify below)	<input type="checkbox"/>
Distribution	<input type="checkbox"/>	
Hotels & Restaurants	<input type="checkbox"/>		

9.2 On average, how many employees are there:

- On your site - In your workplace

9 BECOMING A UNION LEARNING REPRESENTATIVE (ULR)

2.1 How long have you served as a ULR?

Less that 1 year 1-3 years 4-6 years

7-9 years

10-12 years

13+ years

9.2 How did you become interested in being a ULR?

Another Learning Representative
Employer
Trade Union Congress (TUC)

Union Officer/Senior Representative
Other (Please specify below)

.....
.

9.2 How did you become a ULR?

Was nominated
Volunteered

Other (Please specify below)

.....
.

9.2 What attracted you to your role?

.....
.....
.....

2.5 What name is the role of ULR known:

By your organisation
.....

By your Union
.

9.2 Which, if any, of the following Union functions did you carry out before you were a ULR? Please select all that applies.

Steward
Health & Safety Representative
Convenor
Other Function (Please specify below)

Equal Opportunities Representative
Organiser
None
Branch Office role (please specify)

.....

9.2 Do you currently have other Union Function responsibilities? Please select all that applies.

Steward	<input type="checkbox"/>	Equal Opportunities Representative	<input type="checkbox"/>
Health & Safety Representative	<input type="checkbox"/>	Organiser	<input type="checkbox"/>
Convenor	<input type="checkbox"/>	None	<input type="checkbox"/>
Other Function (Please specify below)	<input type="checkbox"/>	Branch Office role (please specify)	<input type="checkbox"/>

.....

3 UNION LEARNING REPRESENTATIVE (ULR) TRAINING

3.1 Did you receive training to become a ULR?

Yes *Please go to Q 3.2*

No *Please go to Q 3.8*

9.2 Which organisation ran the initial learning rep training that you undertook?

Your Union	<input type="checkbox"/>
TUC Education	<input type="checkbox"/>
Other (Please specify)	<input type="checkbox"/>

.....

3.3 How long was your initial learning rep training?

3 days	<input type="checkbox"/>	10 days	<input type="checkbox"/>
5 days	<input type="checkbox"/>	Other (Please specify)	<input type="checkbox"/>

.....

3.4 How satisfied were you with your initial learning rep training?

Very			Very
Satisfied	Satisfied	Dissatisfied	Dissatisfied
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3.5 Did you attend all the training?

Yes	<input type="checkbox"/>	<i>Please go to Q 3.7</i>
No	<input type="checkbox"/>	<i>Please go to Q 3.6</i>

9.2 Please state the reasons for not attending all the training.

.....

.....

.....

3.7 Did you complete the training?

Yes	<input type="checkbox"/>	<i>Please go to Q 3.9</i>
No	<input type="checkbox"/>	<i>Please go to Q 3.8</i>

9.2 Please state the reasons for not completing the training.

.....
.....
.....

9.3 Which, if any, of the following courses for learning reps have you been on?

Basic Skills Awareness	<input type="checkbox"/>	Appraisal Systems	<input type="checkbox"/>
Key Skills	<input type="checkbox"/>	Learndirect Levels 1&2 Support	<input type="checkbox"/>
Investors in People	<input type="checkbox"/>	Information, Advice & Guidance NVQ	<input type="checkbox"/>
Employee Development Schemes	<input type="checkbox"/>	Mentoring	<input type="checkbox"/>
Workplace Learning	<input type="checkbox"/>	IIP internal interviewers course	<input type="checkbox"/>
Information, Advice and Guidance	<input type="checkbox"/>	Basic skills module	<input type="checkbox"/>
Workforce Development	<input type="checkbox"/>		

9 UNION LEARNING REPRESENTATIVE (ULR) ACTIVITY IN THE WORKPLACE

4.1 Describe your role and responsibilities as a ULR.

.....
.....
.....

**4.2 Are you aware of other ULRs within your workplace
that belong to 'your' Union?**

Yes Please go to Q 4.3
No Please go to Q 4.4

4.3 How many other ULRs within your workplace belong to your union?

4.4 Are you aware of other ULRs within your workplace
that belong to other Unions?

Yes Please go to Q 4.5
No Please go to Q 4.7

4.5 How many other URL's within your workplace belong to other unions?

9.2 Which other Unions, if any, are represented in your workplace?

.....
.....

4.7 How many Union members do you
Represent in your workplace?

1-20	<input type="checkbox"/>	21-40	<input type="checkbox"/>	41-60	<input type="checkbox"/>
61-80	<input type="checkbox"/>	81-100	<input type="checkbox"/>	100+	<input type="checkbox"/>

4.8 Have you managed to practice ULR activity
since you completed your training

Yes Please go to Q 4.9
No Please go to Q 4.11

9.2 How have you practiced ULR activities?

.....
.....
.....

4.10 What do most people come to you for?

.....
.....
.....

9.2 Why haven't you had the opportunity to practice your ULR activities?

.....
.....
.....

4.12 Have other non-union colleagues used you in your role as a Learning representative? Yes Please go to Q 4.13
No Please go to section 5

9.2 How have other non-union colleagues used you in your role as a Learning Representative?

.....
.....
.....

5 SUPPORT FOR UNION LEARNING REPRESENTATIVE ACTIVITY

5.1 Do you get paid time to fulfil ULR activities? Yes Please go to Q 5.2
No Please go to Q 5.3

5.2 On average, how many hours paid time are you given to fulfil ULR activities per month?

5.3 Do you give unpaid time to ULR activity? Yes Please go to Q 5.4
No Please go to Section 6

5.4 On average, how many hours unpaid time do you give to ULR activity per month?

6 ARRANGEMENTS THAT SUPPORT YOUR UNION LEARNING REPRESENTATIVE ROLE

6.1 Does your workplace have an Employer/Union Learning Agreement?

Yes Please go to Q 6.2
No Please go to Q 6.3

9.2 When was this agreement accepted?.....

6.3 Is there a working group set up at your workplace for the employer and ULRs?

Yes Please go to Q 6.4
No Please go to Q 6.6

6.4 How often does this group meet

Weekly Fortnightly Monthly
Other
(Please specify)

9.2 Please state the job titles of those who attend the working group meeting?

.....
.....
.....

6.6 Are there any informal arrangements for ULRs to Meet?

Yes Please go to Q 6.7
No Please go to Q 6.8

9.2 What other informal arrangements are made for the working group meetings? Please provide details.

.....
.....
.....

9.3 What resources are you given to help you fulfil your ULR role within the workplace? Please tick which apply to you.

Time	<input type="checkbox"/>	Computer access for email/internet	<input type="checkbox"/>
Office	<input type="checkbox"/>	Learning resources	<input type="checkbox"/>

Telephone	<input type="checkbox"/>	Learning centre	<input type="checkbox"/>
Network	<input type="checkbox"/>	Other (Please specify below)	<input type="checkbox"/>
Administrative support	<input type="checkbox"/>	

9.2 How would you rate your satisfaction with these resources?

	Very		Very
Satisfied	<input type="checkbox"/>	Dissatisfied	<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>

9.2 How would you rate your satisfaction with the accessibility to a TUC Project Worker?

	Very		Very
Satisfied	<input type="checkbox"/>	Dissatisfied	<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>

6.11 Have you attended ULR events provided by TUC

Learning services?

Yes *Please go to Q 6.12*

No *Please go to Q 6.15*

6.12 How many ULR events have you attended that were provided by TUC Learning Services?

1-3	<input type="checkbox"/>	4-6	<input type="checkbox"/>
7-9	<input type="checkbox"/>	10+	<input type="checkbox"/>

6.13 Were the events useful?

Yes *Please go to Q 6.14*

No *Please go to Q 6.15*

9.2 How were the events useful?

.....

.....

.....

9.3 Please provide details of any other arrangements that support your ULR activity?

.....
.....
.....
.....

10 BARRIERS THAT INHIBIT YOUR UNION LEARNING REPRESENTATIVE ROLE

9.2 What barriers inhibit your ULR role. Please tick all that applies.

Lack of time	<input type="checkbox"/>	Learning resources	<input type="checkbox"/>
Lack of office space	<input type="checkbox"/>	Learning centre	<input type="checkbox"/>
Lack of telephone access	<input type="checkbox"/>	Lack of employer/ULR agreement	<input type="checkbox"/>
Lack of networking opportunity	<input type="checkbox"/>	Lack of Committee	<input type="checkbox"/>
Lack of administrative support	<input type="checkbox"/>	Lack of informal arrangements	<input type="checkbox"/>
Lack of computer access for email/internet	<input type="checkbox"/>	Other (Please specify below)	<input type="checkbox"/>
Lack of resources	<input type="checkbox"/>
Lack of access to TUC Project Worker	<input type="checkbox"/>

9 UNION LEARNING REPRESENTATIVE ACTIVITIES

9.2 What activities are you involved in as a learning rep? Please tick all that applies.

Promoting the value of learning	<input type="checkbox"/>
Offering advice and guidance on learning	<input type="checkbox"/>
Getting information on learning opportunities	<input type="checkbox"/>
Negotiating learning with your employer	<input type="checkbox"/>
Negotiating learning with your employer	<input type="checkbox"/>
Negotiating access to college courses	<input type="checkbox"/>

- Helping colleagues to get funds for learning
- Developing learning resources on-site
- Other activities (Please state below)

.....

8.2 Do you get involved in assessing the needs of learners Yes
In your workplace? No

8.3 Have you undertaken a learning needs assessment at Yes *Please go to Q 8.4*
your workplace? No *Please go to Q 8.5*

8.4 How have you assessed learning needs? Please tick all that applies.

FORMALLY

INFORMALLY

- Survey
 - Via formal meetings
 - One to one discussions with colleague
 - Other (Please specify below)
-
 ...

- Ad-hoc meetings
 - 'in passing'
 - Other (Please specify below)
-

9.2 If you have not undertaken a learning needs assessment, who assesses the learning needs within your workplace?

9.3 How are the learning needs assessed within your workplace?

8.7 Once identified, are learning needs addressed Always

within your workplace?

Sometimes
Never

8.8 How many of your colleagues have you assisted to get training and development opportunities?

1-5 6-10
11-15 16+

8.9 Do you keep records of contacts with Colleagues?

Always Please go to Q8.10
Sometimes Please go to Q8.10
Never Please go to Q8.11

8.10 What format are these records in?

.....
.....

8.11 Do you monitor the progress of colleagues on Training and Development programmes?

Always Please go to Q8.12
Sometimes Please go to Q8.12
Never Please go to Q8.13

8.12 How do you monitor the progress of colleagues on Training and Development programmes?

FORMALLY

INFORMALLY

De-brief
Filling in a form
Other (Please specify below)

Discussion
Other (Please specify below)

.....

8.13 Do you have to provide reports on your ULR activities?

Yes *Please go to Q8.14*

No *Please go to Section 9*

9.2 Who do you report your ULR activities to?

.....
.....

9.3 How do you report your ULR activities?

Formally:.....
.....

Informally:.....
.....

9 PERSONAL ACHIEVEMENT

9.1 To date, what has been your biggest success as a ULR?

.....
.....

9.2 In the longer term what would you like to achieve:

For you as a ULR:.....
.....

For you as an Individual:.....
.....

For you as a colleague:.....
.....

10 ADDITIONAL INFORMATION

10.1 If you have any additional comments, please state below.

.....
.....
.....
.....

Please return your completed questionnaire by XXXXXXXXXX using the reply-paid envelope provided.

Thank you for your time and co-operation in completing this questionnaire.

UNIVERSITY OF CENTRAL LANCASHIRE

TUC NORTHWEST REGION

BASELINE RESEARCH PROJECT

**UNION LEARNING REPRESENTATIVE
SURVEY 2004**

Please indicate your response by crossing one box per question, unless otherwise specified. There is an opportunity to add your own comments at the end of the questionnaire. If additional space is required please use the back page, indicating the number of the question next to your answer.

Please complete and return to:

**The Survey and Research Unit
Strategic Development Service
University of Central Lancashire
Preston
PR1 2HE**

1	PERSONAL AND WORKPLACE DETAILS
----------	---------------------------------------

1.1 YOUR NAME:

1.2 JOB TITLE:

1.3 UNION YOU BELONG TO.....

1.4 NAME AND ADDRESS OF WORKPLACE

.....

.....

1.5 How long have you worked in your present role?

1-3 years	<input type="checkbox"/>	4-6 years	<input type="checkbox"/>
7-9 years	<input type="checkbox"/>	10+ years	<input type="checkbox"/>

1.6 Are you

Female?	<input type="checkbox"/>
Male?	<input type="checkbox"/>

1.7 How old are you?

16-21	<input type="checkbox"/>	26-35	<input type="checkbox"/>	46-55	<input type="checkbox"/>
22-25	<input type="checkbox"/>	36-45	<input type="checkbox"/>	56+	<input type="checkbox"/>

1.8 Do you work

Full Time?

Part time?

1.9 On average, how many hours do you work per week?

1-10 hours

31-40 hours

11-20 hours

41-50 hours

21-30 hours

50+ hours

1.10 Is there shift working at your workplace?

Yes

Please go to Q 1.11

No

Please go to Q 1.12

1.11 What shift patterns exist at your workplace?

Days

Nights

Evenings

Double days

1.12 Is your work place

Public Sector?

Private Sector?

Voluntary Sector?

Don't know

1.13 Which sector best describes the nature of your workplace?

Agriculture & Fishing

Transport & Communications

Energy & Water

Banking, Finance & Insurance

Manufacturing

Public administration, Education & Health

Construction

Other (Please specify below)

Distribution

.....

Hotels & Restaurants

1.14 On average, how many employees are there:

- On your site

- In your organisation

2

BECOMING A UNION LEARNING REPRESENTATIVE (ULR)

2.1 How long have you served as a ULR?

Less than 1 year

1-3 years

4-6 years

2.2 How did you become interested in being a ULR?

Another Learning Representative

Union Officer/Senior Representative

Employer

Other (Please specify below)

Trade Union Congress (TUC)

.....

2.3 How did you become a ULR?

Was nominated

Other (Please specify below)

Volunteered

.....

2.4 What attracted you to the role?

.....
.....
.....
.....

2.5 Which, if any, of the following Union functions did you carry out before you were a ULR? Please select all that applies.

Steward	<input type="checkbox"/>	Equal Opportunities Representative	<input type="checkbox"/>
Health & Safety Representative	<input type="checkbox"/>	Organiser	<input type="checkbox"/>
Convenor	<input type="checkbox"/>	None	<input type="checkbox"/>
Other Function (Please specify below)	<input type="checkbox"/>	Branch Office role (please specify)	<input type="checkbox"/>

.....

2.6 Do you currently have other Union Function responsibilities? Please select all that applies.

Steward	<input type="checkbox"/>	Equal Opportunities Representative	<input type="checkbox"/>
Health & Safety Representative	<input type="checkbox"/>	Organiser	<input type="checkbox"/>
Convenor	<input type="checkbox"/>	None	<input type="checkbox"/>
Other Function (Please specify below)	<input type="checkbox"/>	Branch Office role (please specify)	<input type="checkbox"/>

.....

3	UNION LEARNING REPRESENTATIVE (ULR) TRAINING
----------	---

3.1 Did you receive training to become a ULR?

Yes *Please go to Q 3.2*

No *Please go to Q 3.7*

3.2 Which organisation ran the initial learning rep training that you undertook?

Your Union

TUC Education

Other (Please specify)

.....

...

3.3 How long was your initial learning rep training?

3 days 10 days

5 days Other (Please specify)

.....

3.4 How satisfied were you with your initial learning rep training?

	Very		Very
Satisfied	Satisfied	Dissatisfied	Dissatisfied
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3.5 Did you complete the training?

Yes *Please go to Q 3.7*

No

Please go to Q 3.6

3.6 Please state the reasons for not completing the training.

.....
.....
.....

3.7 Which, if any, of the following courses for learning reps have you been on?

Basic Skills Awareness

Key Skills

Investors in People

Employee Development Schemes

Workplace Learning

Information, Advice and Guidance

Workforce Development

Provider: TUC/ Own Union (e.g. TNA)

Appraisal Systems

Learn direct Levels 1&2 Support

Information, Advice & Guidance NVQ

Mentoring

IIP internal interviewers course

Basic skills module

Other (Please specify below)

.....

4	UNION LEARNING REPRESENTATIVE (ULR) ACTIVITY IN THE WORKPLACE
----------	--

4.1 Are you aware of other ULRs within your workplace that belong to 'your' Union? Yes Please go to Q 4.2
 No Please go to Q 4.3

4.2 How many other URLs within your workplace belong to your union?

4.3 Are you aware of other ULRs within your workplace that belong to 'other' Unions? Yes Please go to Q 4.4
 No Please go to Q 4.6

4.4 How many other ULRs within your workplace belong to other unions?

4.5 Which other Unions, if any, are represented in your workplace?

4.6 How many Union members do you represent in your workplace? 1-20 21-40 41-60
 61-80 81-100 100+

4.7 In your role as ULR, do you:
 Raise awareness about learning in the workplace
 Provide members with Information, advice & Guidance about learning and training opportunities
 Signpost members to other sources of advice and guidance

- Represent members' views on training and learning at appropriate forums
- Work with employers to identify learning needs
- Negotiate with employers for training and learning opportunities
- Collate information in relation to workplace training and learning opportunities
- Collate information in relation to Government training and learning initiatives
- Negotiate equal opportunities in learning
- Monitor quality of provision
- Assist members to access funding
- Support innovative workplace developments e.g. Union Learning Fund Projects
- Other (Please specify)

.....

4.8 Have you managed to practice ULR activity since you completed your training

Yes *Please go to Q 4.9*
 No *Please go to Q 4.10*

4.9 What do most people come to you for?

.....

4.10 Why haven't you had the opportunity to practice your ULR activities?

.....

4.11 How have other non-union colleagues, if any, used you in your role as ULR? Tick all that applies.

Information & advice re: training & learning	<input type="checkbox"/>	Information & advice re: training providers	<input type="checkbox"/>
Time off for Union duties	<input type="checkbox"/>	Other (Please Specify)	<input type="checkbox"/>
Discussions/negotiations with employer	<input type="checkbox"/>	

4.12 Do you get involved in assessing the needs of learners in your workplace?

Yes
 No

4.13 Have you undertaken a learning needs assessment at your workplace?

Yes *Please go to Q 4.14*
 No *Please go to Q 4.15*

4.14 How have you assessed learning needs? Please tick all that applies.

FORMALLY		INFORMALLY	
Survey	<input type="checkbox"/>	Ad-hoc meetings	<input type="checkbox"/>
Via formal meetings	<input type="checkbox"/>	'in passing'	<input type="checkbox"/>
One to one discussions with colleague	<input type="checkbox"/>	Other (Please specify below)	<input type="checkbox"/>
Other (Please specify below)	<input type="checkbox"/>	
.....			

4.15 If you have not undertaken a learning needs assessment, who assesses the learning needs within your workplace?

.....
.....
.....

4.16 How are the learning needs assessed within your workplace?

.....
.....
.....

4.17 Once identified, are learning needs addressed within your workplace?

Always
Sometimes
Never

4.18 How many of your colleagues, if any have you assisted to get training and development opportunities?

1-5 6-10
11-15 16+

4.19 Do you keep records of contacts with colleagues?

Always Please go to Q4.20
Sometimes Please go to Q4.20
Never Please go to Q4.21

4.20 What format are these records in?

.....
.....

4.21 Do you monitor the progress of colleagues on Training and Development programmes?

Always Please go to Q4.22
Sometimes Please go to Q4.22
Never Please go to Q4.23

4.22 How do you monitor the progress of colleagues on Training and Development programmes?

FORMALLY

INFORMALLY

De-brief

Filling in a form

Other (Please specify below)

.....

Discussion

Other (Please specify below)

.....

4.23 Do you have to provide reports on your ULR activities?

Yes *Please go to Q4.24*

No *Please go to Section 5*

4.24 Who do you report your ULR activities to?

.....

.....

4.25 How do you report your ULR activities?

Formally:.....

.....

Informally:.....

.....

5.1 Do you get paid time to fulfil ULR activities?

Yes Please go to Q 5.2

No Please go to Q 5.3

5.2 On average, how many hours paid time are you given to fulfil ULR activities per month?

5.3 Do you give unpaid time to ULR activity?

Yes Please go to Q 5.4

No Please go to Section 6

5.4 On average, how many hours unpaid time do you give to ULR activity per month?

6	ARRANGEMENTS THAT SUPPORT YOUR UNION LEARNING REPRESENTATIVE ROLE
----------	--

6.1 Does your workplace have an Employer/Union Learning Agreement?

Yes Please go to Q 6.2

No Please go to Q 6.3

6.2 When was this agreement accepted?.....

6.3 Is there a working group set up at your workplace for the employer and ULRs?

Yes Please go to Q 6.4

No Please go to Q 6.6

6.4 How often does this group meet

Weekly Fortnightly Monthly
Other
(Please specify)

6.5 Please state the job titles of those who attend the working group meeting?

.....
.....
.....

6.6 Are there any informal arrangements for ULRs to meet?

Yes *Please go to Q 6.7*
No *Please go to Q 6.8*

6.7 What other informal arrangements are made for the working group meetings? Please provide details.

.....
.....
.....

6.8 What resources are you given to help you fulfil your ULR role within the workplace? Please tick which apply to you.

Time	<input type="checkbox"/>	Computer access for email/internet	<input type="checkbox"/>
Office	<input type="checkbox"/>	Learning resources	<input type="checkbox"/>
Telephone	<input type="checkbox"/>	Learning centre	<input type="checkbox"/>
Network	<input type="checkbox"/>	Support from Union	<input type="checkbox"/>
Administrative support	<input type="checkbox"/>	Other (Please specify)	<input type="checkbox"/>

Support from TUC

.....

6.9 How would you rate your satisfaction with these resources?

	Very					Very
	Satisfied	Satisfied	Dissatisfied	Dissatisfied		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

6.10 How satisfied are you with the support from the TUC/own Union?

	Very					Very
	Satisfied	Satisfied	Dissatisfied	Dissatisfied		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

6.11 What additional support would you like to receive?

.....

6.12 Have you attended ULR events provided by TUC learning services?

Yes Please go to Q 6.13
 No Please go to Q 6.16

6.13 How many ULR events have you attended that were provided by TUC Learning Services?

1-3	<input type="checkbox"/>	4-6	<input type="checkbox"/>
7-9	<input type="checkbox"/>	10+	<input type="checkbox"/>

6.14 Were the events useful?

Yes Please go to Q 6.15
 No Please go to Q 6.16

6.15 How were the events useful?

.....

6.16 Please provide details of any other arrangements that support your ULR activity?

.....

7	<i>BARRIERS THAT INHIBIT YOUR UNION LEARNING REPRESENTATIVE ROLE</i>
----------	---

7.1 What barriers inhibit your ULR role. Please tick all that applies.

Lack of time	<input type="checkbox"/>	Learning resources	<input type="checkbox"/>
Lack of office space	<input type="checkbox"/>	Learning centre	<input type="checkbox"/>
Lack of telephone access	<input type="checkbox"/>	Lack of employer/ULR agreement	<input type="checkbox"/>
Lack of networking opportunity	<input type="checkbox"/>	Lack of Committee	<input type="checkbox"/>
Lack of administrative support	<input type="checkbox"/>	Lack of informal arrangements	<input type="checkbox"/>
Lack of computer access for email/internet	<input type="checkbox"/>	Other (Please specify below)	<input type="checkbox"/>
Lack of resources	<input type="checkbox"/>	
Lack of access to TUC Project Worker	<input type="checkbox"/>	
		

8	PERSONAL ACHIEVEMENT
----------	-----------------------------

8.1 To date, what has been your biggest success as a ULR?

.....
.....

8.2 In the longer term what would you like to achieve:

For you as a ULR.....

.....
.....

For you as an individual:.....

.....
.....

For your colleagues:.....

.....
.....

9	ADDITIONAL INFORMATION
----------	-------------------------------

9.1 If you have any additional comments, please state below.

.....
.....
.....
.....

Please return your completed questionnaire by Wednesday 31st March using the reply-paid envelope provided.

Thank you for your time and co-operation in completing this questionnaire.

TUC Northwest Region

Union Learning Rep. Baseline Research Project

Dear Union Learning Representative

I am a member of the HRM Division, Lancashire Business School, University of Central Lancashire, Preston and I am currently completing a North West Development Agency (NWDA) funded research project on behalf of TUC Learning Services North West Region.

The aim of the research is to identify the baseline of Union Learning Representative (ULR) activity within the region as at February/March 2004. The findings will be used to inform **future bids for funding to develop, sustain and support Union Learning Representative** activity within the North West Region.

A crucial part of the research is to survey Union Learning Representatives. To achieve this, please find attached a questionnaire for you to provide us with your opinions. We do appreciate that many of you completed a similar questionnaire during Summer 2003. This contributed to a **national survey**. We really need your help to get a clear picture of the activity and related issues **within the North West**. With this in mind, colleagues from TUC Learning Services North West and I hope that you will make every effort to take part in the survey by completing the attached questionnaire.

Completed questionnaires should be returned to the University in the enclosed pre-paid enveloped by **20th February 2004**. If you have any queries about the questionnaire or would like some assistance in completing it then please contact either your local TUC Learning Services office and/or your TUC Project Worker, or myself.

I do hope you will be able to support this initiative and I look forward to receiving your response in the near future.

Many thanks

Alison Hollinrake

Contact Details:

TUC Learning Services North West Regional office tel. 0151 236 2321

Greater Manchester Team via Nigel Williams tel. 0161 877 4407

Lancashire Team via John Halligan tel. 0151 236 2321

Merseyside Team via Sheila Pevely tel. 0151 236 2321

Warrington and Cheshire Team via Cheryl Wiseman tel. 01925 494591

Contact can be made with Alison:

by 'phone: 01772 894781 or 07811 025 355 or email: ahollinrake@uclan.ac.uk



23rd February 2004

Dear Union Learning Representative

Re: TUC Northwest Region - Union Learning Rep. Baseline Research Project

I am currently completing a North West Development Agency (NWDA) funded research project on behalf of TUC Learning Services North West Region.

A questionnaire to gather Union Learning Representatives' opinions was sent to you to complete and return by 20th February 2004. The views of Union Learning Representatives within the region are crucial to the survey and we would like to give you the opportunity to have your say if you have not yet returned the questionnaire.

We appreciate people have very busy lives and this may not have been a priority for you, however we do want you to have a valuable input to the survey. The findings of the survey will inform future bids for funding to develop, sustain and support Union Learning Representative activity within the North West Region. I enclose another copy of the questionnaire for your convenience for you to complete and return in the pre-paid envelope supplied. No questionnaire will be used individually, all information contained in the questionnaires will be used to construct summary information with a view to recognising trends.

Please could you complete the enclosed questionnaire and return it back by:

12th March 2004.

If you have any queries about the questionnaire or would like some assistance in completing it then please contact either your local TUC Learning Services office and/or your TUC Project Worker, or myself. Please see over for contact details.

I do hope you will be able to support this initiative and I look forward to receiving your response in the near future.

Many thanks

Alison Hollinrake

Contact Details:

TUC Learning Services North West Regional office tel. 0151 236 2321

Greater Manchester Team via Nigel Williams tel. 0161 877 4407

Lancashire Team via John Halligan tel. 0151 236 2321

Merseyside Team via Sheila Pevely tel. 0151 236 2321

Warrington and Cheshire Team via Cheryl Wiseman tel. 01925 494591

Contact can be made with Alison:

by 'phone: 01772 894781 or 07811 025 355 or email: ahollinrake@uclan.ac.uk



July 2004

Dear Union Learning Representative

Re: TUC Northwest Region - Union Learning Rep. Baseline Research Project

I wrote to you earlier on this year regarding the above research project on behalf of TUC Learning Services North West. According to my records I don't appear to have had a response from you.

The first stage of the project is nearing completion and we have some interesting findings from 27% of the Union Learning Representatives we have contacted. In order to support these further we wanted to give you another opportunity to be part of the survey. The findings of the survey will inform future bids for funding to develop, sustain and support Union Learning Representative activity within the North West Region.

I enclose another copy of the questionnaire for your convenience for you to complete and return in the pre-paid envelope supplied. No questionnaire will be used individually, all information contained in the questionnaires will be used to construct summary information with a view to recognising trends.

If you are happy to be involved, please could you complete the enclosed questionnaire and return it back by:

23 July 2004.

If you have any queries about the questionnaire or would like some assistance in completing it then please contact either your local TUC Learning Services office and/or your TUC Project Worker, or myself. Please see over for contact details. If however you are no longer active as a Union Learning Representative we would appreciate it if you would confirm this by completing the attached reply form and return in the pre-paid envelope supplied.

Many thanks

Alison Hollinrake

Contact Details:

TUC Learning Services North West Regional office tel. 0151 236 2321

Greater Manchester Team via John Halligan

Lancashire Team via Keith Pemberton

Merseyside Team via Carl Roper

Warrington and Cheshire Team via Dave Eva

Contact can be made with Alison:

by 'phone: 01772 894781 or 07811 025 355 or email: ahollinrake@uclan.ac.uk



Re: TUC Northwest Region - Union Learning Rep. Baseline Research Project

Name:
Union you belong to:
Date you commenced ULR role?
How long were you active as a ULR?

When did you resign from ULR activity?
Reason for ceasing ULR activity?

Many thanks

Alison Hollinrake

Appendix 5: Affiliate Questionnaire

UNIVERSITY OF CENTRAL LANCASHIRE

TUC NORTHWEST REGION

BASELINE RESEARCH PROJECT

**UNION LEARNING REPRESENTATIVE
SURVEY 2003**

AFFILIATE QUESTIONNAIRE

Please indicate your response by crossing one box per question, unless otherwise specified. There is an opportunity to add your own comments at the end of the questionnaire.

Please complete and return to:

The Survey and Research Unit

**Strategic Development Service
University of Central Lancashire**

Preston

PR1 2HE

by

XXXXXXXX 2003

Formal recognition in Rule Book

Specific Branch Officer

Specific National Officer

Other (Please specify below)

Specific Regional Officer

.....

.

10 Within your Branch who is responsible for the following areas of work?:

Issue:

Role Title:

Learning Agenda

ULR Policy

ULR Activity

Other comments

.....
.....
.....
.....

11 Do members fulfilling ULR activity hold other union office responsibilities? Please select all that applies.

Steward	<input type="checkbox"/>	Equal Opportunities Representative	<input type="checkbox"/>
Health & Safety Representative	<input type="checkbox"/>	Organiser	<input type="checkbox"/>
Convenor	<input type="checkbox"/>	None	<input type="checkbox"/>
Other Function (Please specify below)	<input type="checkbox"/>	Branch Office role (please specify)	<input type="checkbox"/>

.....

Please tick all that apply (? = don't know)

12 Does the Branch consider ULR activity at Branch Meetings?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	?	<input type="checkbox"/>
Is this a standing item on Branch Meeting Agenda?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	?	<input type="checkbox"/>
Are ULR issues discussed at Regionall Level ?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	?	<input type="checkbox"/>
Are ULR issues discussed at National Level ?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	?	<input type="checkbox"/>
Does the Union regard ULR activity as a core activity?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	?	<input type="checkbox"/>

Other comments

.....

.....

.....

.....

ULR APPOINTMENT & TRAINING

13 How are ULRs appointed by the Union?

Nominated

Other (Please specify below)

Volunteer

.....

Elected

.....

14 Do individuals receive training to become a ULR?

Always

Sometimes

Never

15 Duration of initial ULR training?

3 days

10 days

5 days

Other (Please specify)

.....
...

16 Provider of initial ULR training?

The Union

TUC Education

Other (Please specify)

17 How satisfied is your Union with the initial ULR training?

	Very				Very
Satisfied		Satisfied	Dissatisfied	Dissatisfied	
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

18 Which, if any, of the following further development courses do your ULRs attend?

Basic Skills Awareness	<input type="checkbox"/>	Appraisal Systems	<input type="checkbox"/>
Key Skills	<input type="checkbox"/>	Learndirect Levels 1&2 Support	<input type="checkbox"/>
Investors in People	<input type="checkbox"/>	Information, Advice & Guidance NVQ	<input type="checkbox"/>
Employee Development Schemes	<input type="checkbox"/>	Mentoring	<input type="checkbox"/>
Workplace Learning	<input type="checkbox"/>	IIP internal interviewers course	<input type="checkbox"/>
Information, Advice and Guidance	<input type="checkbox"/>	Basic skills module	<input type="checkbox"/>
Workforce Development	<input type="checkbox"/>	Other (please specify below)	<input type="checkbox"/>

(other).....

UNION LEARNING REPRESENTATIVE (ULR) CAPACITY

19

Date first ULRs appointed within this branch?

Total membership in branch as at 31.12.03

Number of ULRs in branch as at 31.12.03

What would be a reasonable ratio of ULRs to membership?

When does this union hope to achieve this by?

SUPPORT FOR UNION LEARNING REPRESENTATIVE ACTIVITY

20 Do your ULRs get paid time to fulfil ULR activities? Yes
No

21 On average, how many hours paid time are your ULRs given to fulfil ULR activities per month?

22 Do you know if ULRs give unpaid time to ULR activity? Yes
No

23 On average, how many hours unpaid time are you aware that ULRs give to ULR activity per month?

PROCEDURES THAT SUPPORT THE ULR ROLE

In the Workplace:

24 Workplace Employer/Union Learning Agreement ? Yes
No

Other comments

.....
.....

25 Workplace Committee and/or informal arrangements?

Yes
No

Please provide detail

.....
.....
.....
.....

26 Generally, how often do these group(s) meet?

Weekly Fortnightly Monthly
Other
(Please specify)

27 Are there any informal arrangements for ULRs to Meet?

Yes Please go to Q 6.7
No Please go to Q 6.8

28 What other informal arrangements are made for the working group meetings? Please provide details.

.....
.....
.....

29 What resources are ULRs given to help them fulfil their ULR role within the workplace? Please tick which apply.

Time Computer access for email/internet
Office Learning resources

Telephone

Learning centre

Network

Other (Please specify below)

Administrative support

.....
.

Other comments

.....
.....
.....
.....

30 How would you rate your satisfaction with these resources?

	Very		Very
Satisfied	Satisfied	Dissatisfied	Dissatisfied
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

31 How would you rate your satisfaction with ULR accessibility to a TUC Project Worker?

	Very		Very
Satisfied	Satisfied	Dissatisfied	Dissatisfied
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

At Branch Level:

32 Branch Committee and/or informal arrangements?

Yes

No

Please provide detail

.....
.....
.....
.....

33 Please provide details of any other Branch arrangements that support ULR activity?

.....
.....
.....
.....

BARRIERS THAT INHIBIT THE UNION LEARNING REPRESENTATIVE ROLE

34 What barriers inhibit the ULR role. Please tick all that applies.

Lack of time	<input type="checkbox"/>	Learning resources	<input type="checkbox"/>
Lack of office space	<input type="checkbox"/>	Learning centre	<input type="checkbox"/>
Lack of telephone access	<input type="checkbox"/>	Lack of employer/ULR agreement	<input type="checkbox"/>
Lack of networking opportunity	<input type="checkbox"/>	Lack of Committee	<input type="checkbox"/>
Lack of administrative support	<input type="checkbox"/>	Lack of informal arrangements	<input type="checkbox"/>
Lack of computer access for email/internet	<input type="checkbox"/>	Other (Please specify below)	<input type="checkbox"/>
Lack of resources	<input type="checkbox"/>
Lack of access to TUC Project Worker	<input type="checkbox"/>
	
Lack of access to Union support	<input type="checkbox"/>

UNION LEARNING REPRESENTATIVE ACTIVITIES

35 What activities are your ULRs involved in? Please tick all that applies.

Promoting the value of learning	<input type="checkbox"/>
Offering advice and guidance on learning	<input type="checkbox"/>
Getting information on learning opportunities	<input type="checkbox"/>
Negotiating learning with your employer	<input type="checkbox"/>

- Negotiating learning with your employer
- Negotiating access to college courses
- Helping colleagues to get funds for learning
- Developing learning resources on-site
- Other activities (Please state below)

.....
 .

36 Do your ULRs get involved in assessing the needs of learners in the workplace? Yes
 No

37 If 'Yes' how is this done? Please tick all that applies.

FORMALLY

INFORMALLY

- | | |
|--|---|
| Survey <input type="checkbox"/> | Ad-hoc meetings <input type="checkbox"/> |
| Via formal meetings <input type="checkbox"/> | 'in passing' <input type="checkbox"/> |
| One to one discussions with colleague <input type="checkbox"/> | Other (Please specify below) <input type="checkbox"/> |
| Other (Please specify below) <input type="checkbox"/> | |

.....
 ...

38 Do your ULRs keep records of contacts with colleagues? Always
 Sometimes
 Never

39 What format are these records in?

.....

40 Do your ULRs monitor the progress of colleagues on Training and Development programmes?

Always

Sometimes

Never

41 How do your ULRs monitor the progress of colleagues on Training and Development programmes?

FORMALLY	INFORMALLY
De-brief <input type="checkbox"/>	Discussion <input type="checkbox"/>
Filling in a form <input type="checkbox"/>	Other (Please specify below) <input type="checkbox"/>
Other (Please specify below) <input type="checkbox"/>
.....	.

42 Do your ULRs have to provide reports on ULR activities?

Yes *Please go to Q8.14*

No *Please go to Section 9*

43 Who do they report ULR activities to? Please tick all that apply

Union	<input type="checkbox"/>
	<input type="checkbox"/>
TUC	<input type="checkbox"/>
	<input type="checkbox"/>
Employer	<input type="checkbox"/>
	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>
	<input type="checkbox"/>

.....
.....

44 How do they report ULR activities?

Formally:.....
.....

Informally:.....
.....

ULR ACHIEVEMENT

45 To date, what has been your Union's biggest success from ULR activity?
.....
.....

46 What does your Union recognise as evidence of success from ULR activity?
.....
.....

47 What supports achievement of this?
.....
.....

48 What may inhibit achievement of this?
.....
.....

ADDITIONAL INFORMATION

49 If you have any additional comments, please state below.
.....
.....
.....
.....

Please return your completed questionnaire by XXXXXXXXXX using the reply-paid envelope provided.

Thank you for your time and co-operation in completing this questionnaire.

Dear

Research for Union Learning and Skills Fund

I am writing to you to ask for your assistance. As part of the TUC's discussion with Regional agencies on the development of the Regional Skills agenda we have been discussing the

potential for a Fund to which Trade Unions would apply for assistance. The NWDA has as a result funded some research that will establish the baseline of current union activity and involvement in Learning and Skills and also establish what unions see as barriers to the development of this agenda. The aim will be:

- a. Provide evidence for the need for the fund
- b. Inform the design and direction of the fund.

The fund would be a supplement to the Union Learning Fund and would only operate within the North West.

The University of Central Lancashire has been commissioned to carry out this research and are working with the TUC. It is important that we get a good response to this research and that we demonstrate trade union interest in and support for this agenda. I am therefore urging you to encourage your officers and learning representatives (ULRs) to participate in the research. The research will involve:

- a. A survey of existing union learning representatives
- b. A survey of regional union official structures, and
- c. some focus groups.

I would be grateful if you could advise me on whether you are the appropriate person for the union survey (b) to be sent to. This survey will be looking at how the union supports ULRs and what

arrangements and resources might improve things. If you wish the survey to be sent to someone else, please inform Dave Eva (deva@tuc.org.uk) who will be arranging for the survey to be sent out.

I would also be grateful if you could consider your unions involvement in the focus groups that will be established to look at the design of the fund. These will be organised by the TUC

once the research has fed back and we expect that these will start towards the end of March. If you would be interested in hosting a focus group in an area, or would like to hold a focus group for your region, please contact Dave Eva who will be able to provide some financial assistance for the focus groups.

The TUC believes that the successful establishment of a Fund will be of great assistance to unions in the North West and I look forward to your assistance in this matter

Yours faithfully

Alan Manning

Regional Secretary



15 March 2004

Dear

I write with reference to Alan Manning's letter of 16th February 2004.

Re: TUC Northwest Region Union Learning Rep. Baseline Research Project

I am a member of the HRM Division, Lancashire Business School, University of Central Lancashire, Preston and I am currently completing the above North West Development Agency (NWDA) funded research project on behalf of TUC Learning Services North West Region.

The aim of the research is to identify the baseline of Union Learning Representative (ULR) activity within the region as at February/March 2004. The findings will be used to inform future bids for funding to develop, sustain and support Union Learning Representative activity within the North West Region.

A crucial part of the research is to survey Affiliate Unions regarding Union Learning Representative activity within individual unions. To achieve this, please find attached a questionnaire for you to provide us with relevant information.

Completed questionnaires should be returned to the University in the enclosed pre-paid enveloped by **31st March 2004** (please advise if this date is unfeasible). If you have any queries about the questionnaire then please contact either your local TUC Learning Services office or my self (contact details overleaf).

I do hope you will be able to support this initiative and I look forward to receiving your response in the near future.

Many thanks

Alison Hollinrake

Contact Details:

TUC Learning Services North West Regional office tel. 0151 236 2321

Greater Manchester Team via Nigel Williams tel. 0161 877 4407

Lancashire Team via John Halligan tel. 0151 236 2321

Merseyside Team via Sheila Pevely tel. 0151 236 2321

Warrington and Cheshire Team via Cheryl Wiseman tel. 01925 494591

Contact can be made with Alison:

by 'phone: 01772 894781 or 07811 025 355 or email: ahollinrake@uclan.ac.uk

Trades Union Congress
Learning Services: North West



our ref: DE/MW
date: 22 June 2004
contact: Dave Eva
direct line: 0151 236 5366
email: deva@tuc.org.uk

Dear Colleague

TUC : NWDA Survey of ULR Activity

I gather that your union has not yet responded to this research report. I would be grateful if you would arrange for a response to be made.

The research will underpin the NWDA and LSC response to TUC requests for support and resources for trade union activity on learning and skills activity. If unions do not respond and show an interest in this area it obviously undermines our ability to represent a strong trade union view to the regional agencies.

If you need any assistance in completing the form or wish to discuss the request further with me, please do not hesitate to get in touch.

If your union is not involved with Union Learning Representative activity we would appreciate it if you would confirm this by completing the attached reply form and return in the pre-paid envelope supplied.

Yours sincerely

A handwritten signature in black ink, appearing to read 'Dave Eva', written in a cursive style.

Dave Eva
Regional Coordinator
Learning Services North West

The Cotton Exchange, Suite 506-510, Old Hall Street, Liverpool L3 9UD
telephone: 0151 236 2321 fax: 0151 236 2331 email: deva@tuc.org.uk www.tuc.org.uk
Project Co-ordinator: *Dave Eva* General Secretary: *Brendan Barber*



Re: TUC Northwest Region - Union Learning Rep. Baseline Research Project

Union:
Total membership in North West Region:
Date this figure applies to:
Why is your union not involved in ULR activity at this time?
Does your union plan to be involved in ULR activity in the future?
Estimated date this will commence?
Procedures to be completed to facilitate this?

Many thanks

Alison Hollinrake

Appendix 6: Employer Questionnaire

Employer Survey Draft 01

**TUC Learning Services Northwest Region
Union Learning Representative Baseline Research Report
2004**

Employers' Survey

Circulation:

1. Census of all employers on ULR database.

Aim:

To gain insight as to employers' views of the ULR role

Objectives:

To identify which organisations are most likely to support ULR activity, by sector and number of employees.

To identify the level of formalisation of ULR activity in organisations

To identify the application of statutory rights for ULRs

To identify examples of positive and negative employer experience of ULR activity.

Questions:

Section A:

1. Is the organisation:
 - a. Public sector
 - b. Private sector
 - c. Voluntary sector

2. Which sector best describes the nature of the organisation?

- a. Agriculture & Fishing
- b. Energy & Water
- c. Manufacturing
- d. Construction
- e. Distribution
- f. Hotels & Restaurants
- g. Transport & Communications
- h. Banking, Finance & Insurance
- i. Public administration, Education & Health
- j. Other (please specify)

3. Number of employees in the organisation:

- a. 10 – 49
- b. 50 – 199
- c. 200 plus

Section B

4. Which Trades Unions are represented in the organisation?

5. Are there Union Learning Representatives (ULRs) within the organisation?

- a. Yes/No
- b. How many

6. Is your organisation aware of statutory rights for ULR activity in the workplace?

7. Does your organisation have a Learning Agreement to support ULR activity? (Yes/No)

- a. Was this jointly negotiated?
- b. Date agreement established
- c. Does the agreement incorporate the statutory rights for ULRs (April 2003)
- d. Are there formal arrangements for Working Group/ Project Management of ULR activity within the organisation?
- e. How much paid time is allocated to each ULR to facilitate ULR activity?
- f. What resources are allocated to ULRs to facilitate their activity?

8. Which department is responsible for Learning, Training and Development activity within the organisation?

- a. Personnel
- b. Human Resources
- c. Training Department
- d. Other – please specify

9. How would you rate the relationship between this department and the ULRs
- a. Very positive
 - b. Positive
 - c. Rather negative
 - d. Very negative
10. As an employer, where do you seek information and guidance on facilitating ULR activity?
11. Are Line Managers given guidance on facilitating ULR activity?
- a. Via Learning Agreement
 - b. Specific development programme
 - c. Other (please specify)
12. What do you experience as positive outcomes of ULR activity?
13. What do you experience as negative outcomes of ULR activity?
14. What do you experience as barriers to ULR activity?
15. What are your future hopes for ULR activity?
16. What are your fears for ULR activity?
17. Any other comments

Employer Survey draft01

Design of Employers' Survey

Section	Question No	Data re: objective	Notes
A: Organisational profile	1	i	
	2	i	As in the ULR survey the standard industrial categories (SICs) from the Office for National Statistics (ONS) were used (accessed 24 October 2003).
	3	i	Numerical variables as in ULR survey
B: Unions & Learning in the organisation	4	ii	
	5	ii	
	6	iii	
	7	ii	
	8	ii	
	9	iv	
	10	ii	
	11	i & ii	
	12	iv	
	13	iv	
	14	iv	
	15	iv	
	16	iv	

	17	i-iv	
--	----	------	--

Version II

Revision	Notes:
Structure	The labels for section A and B were removed and the questionnaire was presented as a single section of eventually 25 questions (see Appendix 6: ?)
Question no.	
1	'don't know' variable given
6	Additional question to reduce ambiguity of Q5 on mk1
9-14	The variables from Q7 mk1 became individual questions. To simplify the coding and data entry process.
17	Source variables added to aid coding and data input
18	Reworded from 'Are' to 'How are...' to reduce ambiguity.
19	Variables for response added. List adapted from (CIPD,2004:10).
20	Delete repeat question
21	Variables for response added. Design based on feedback given in respect of employer opinions at focus group events.
22	Variables for response added. Design based on feedback given in respect of employer opinions at focus group events.

Employer Survey

1 Is your organisation

Public Sector? Private Sector?

Voluntary Sector? Don't know

2 Which sector best describes the nature of your workplace?

Agriculture & Fishing	<input type="checkbox"/>	Transport & Communications	<input type="checkbox"/>
Energy & Water	<input type="checkbox"/>	Banking, Finance & Insurance	<input type="checkbox"/>
Manufacturing	<input type="checkbox"/>	Public administration, Education & Health	<input type="checkbox"/>
Construction	<input type="checkbox"/>	Other (Please specify below)	<input type="checkbox"/>
Distribution	<input type="checkbox"/>	
Hotels & Restaurants	<input type="checkbox"/>		

3 How many employees are there in your organisation?

1-9 50-199

10-49 200 +

4 Which Trade Unions, if any, are represented in your workplace?

.....

.....

.....

.....

.....

5 Are there Union Learning Representatives (ULRs) within your organisation?

Yes

No **Go to Q7**

6 How many ULRs are within your organisation

7 Is your organisation aware of statutory rights for ULR activity in the workplace?

Yes

No

8 Does your organisation have a Learning Agreement to support ULR activity?

Yes

No

Go to Q12

9 Was the Learning Agreement jointly negotiated between the employer and ULR?

Yes

No

10 When was this agreement accepted?.....

11 Does the agreement incorporate the statutory rights for ULRs (April 2003)?

Yes

No

12 Are there formal arrangements for Working Group/Project Management of ULR activity within the organisation?

Yes

No

13 On average, how many hours paid time are given to ULRs to fulfil their ULR

14 What resources are allocated to ULRs to facilitate their activity?

...insert Q 6.8 from ULR survey except for 'support from TUC/union'.....
.....
.....
.....

15 Which department is responsible for Learning, Training and Development activity within the organisation?

Personnel

Training Department

Human Resources

Other (Please Specify)

.....
.....

16 How would you rate the relationship between this department and the ULRs?

Very Positive

Positive

Rather Negative

Very Negative

17 As an employer, where do you seek information and guidance on facilitating ULR activity?

- ACAS
- CIPD
- Learning and Skills Council (LSC)
- Business Link...
- Employers' Forum (please state)

TUC Learning Services
Union (please state)

.....
.....
.....
.....

18 How are Line Managers given guidance on facilitating ULR activity?

Via Learning Agreement	<input type="checkbox"/>
Specific development programme	<input type="checkbox"/>
Other (Please Specify)	<input type="checkbox"/>

.....
.....

19 What do you experience as positive outcomes of ULR activity?

Allies in promoting the value of learning and training within the organisation
Generating 'bottom up' demand for learning
Engaging workers who might otherwise be reluctant to discuss their learning needs
Source of advice for employers
Increase in production/ service provision
Other (please specify)
(Adapted from CIPD, 2004:10)

.....
.....
.....
.....

20 What do you experience as positive outcomes of ULR activity?

Delete repeat question.....

.....
.....
.....

21 What do you experience as negative outcomes of ULR activity?

Confusion as to where employees should go for advice on Learning and Training opportunities
Ambiguity of role of Training Department viz a vie role of ULR
Create too much interest in Learning and Training within the workforce
Amount of lost production/service provision in facilitating ULR activity
Amount of lost production/service provision in facilitating Learning and Training activity

.....

22 What do you experience as barriers to ULR activity?

Lack of employee support
Lack of senior management team support
Lack of Line Manager support
Lack of union support
Lack of external funding
Lack of time
Lack of other resources eg space, computer access
Conflict between Training Department and ULRs
Lack of Learning agreement
Lack of learning committee
Other (please specify)

.....

23 What are your future hopes for ULR activity?

.....
.....
.....
.....

24 What are your fears for ULR activity?

.....
.....
.....
.....

25 Any other comments.

.....
.....
.....
.....



ULR Research Project - Employer Survey 2005

1 Is your organisation

Public Sector?	<input type="checkbox"/>	Private Sector?	<input type="checkbox"/>
Voluntary Sector?	<input type="checkbox"/>	Don't know	<input type="checkbox"/>

2 Which sector best describes the nature of your workplace?

Agriculture & Fishing	<input type="checkbox"/>	Transport & Communications	<input type="checkbox"/>
Energy & Water	<input type="checkbox"/>	Banking, Finance & Insurance	<input type="checkbox"/>
Manufacturing	<input type="checkbox"/>	Public administration, Education & Health	<input type="checkbox"/>
Construction	<input type="checkbox"/>	Other (Please specify below)	<input type="checkbox"/>
Distribution	<input type="checkbox"/>	
Hotels & Restaurants	<input type="checkbox"/>		

3 How many employees are there in your organisation?

1-9	<input type="checkbox"/>	50-199	<input type="checkbox"/>
10-49	<input type="checkbox"/>	200 +	<input type="checkbox"/>

4 Which Trade Unions, if any, are represented in your workplace?

.....
.....
.....
.....

5 Are there Union Learning Representatives (ULRs) within your organisation?

Yes

No

Go to Q7

6 How many ULRs are within your organisation

7 Is your organisation aware of statutory rights for ULR activity in the workplace?

Yes

No

8 Does your organisation have a Learning Agreement to support ULR activity?

Yes

No

Go to Q12

9 Was the Learning Agreement jointly negotiated between the employer and ULR?

Yes

No

Please Turn Over

10 When was this agreement accepted?.....

11 Does the agreement incorporate the statutory rights for ULRs (April 2003)?

Yes

No

12 Are there formal arrangements for Working Group/Project Management of ULR activity within the organisation?

Yes

No

13 On average, how many hours paid time, per month are given to ULRs to fulfil their ULR activity?

14 What resources are allocated to ULRs to facilitate their activity?

Time	<input type="checkbox"/>	Computer access for email/internet	<input type="checkbox"/>
Office	<input type="checkbox"/>	Learning resources	<input type="checkbox"/>
Telephone	<input type="checkbox"/>	Learning centre	<input type="checkbox"/>
Network	<input type="checkbox"/>	Other (Please specify)	<input type="checkbox"/>
Administrative support	<input type="checkbox"/>	
Support from TUC	<input type="checkbox"/>		

15 Which department is responsible for Learning, Training and Development activity within the organisation?

Personnel	<input type="checkbox"/>	Training Department	<input type="checkbox"/>
Human Resources	<input type="checkbox"/>	Other (Please Specify)	<input type="checkbox"/>
		

16 How would you rate the relationship between this department and the ULRs?

- Very Positive
- Positive
- Rather Negative
- Very Negative

17 As an employer, where do you seek information and guidance on facilitating ULR activity?

- | | | | |
|-----------------------------------|--------------------------|------------------------|--------------------------|
| ACAS | <input type="checkbox"/> | Business Link | <input type="checkbox"/> |
| CIPD | <input type="checkbox"/> | TUC Learning Services | <input type="checkbox"/> |
| Learning and Skills Council (LSC) | <input type="checkbox"/> | Union (Please Specify) | <input type="checkbox"/> |
| Employers' Forum (Please Specify) | <input type="checkbox"/> | | |
| | | | |

18 How are Line Managers given guidance on facilitating ULR activity?

- Via Learning Agreement
- Specific development programme
- Other (Please Specify)
-
-
-

19 What do you experience as positive outcomes of ULR activity?

- Allies in promoting the value of learning and training within the organisation
- Generating 'bottom up' demand for learning
- Engaging workers who might otherwise be reluctant to discuss their learning needs
- Source of advice for employers
- Increase in production/ service provision
- Other (please specify)
-
-
-

20 What do you experience as negative outcomes of ULR activity?

- Confusion as to where employees should go for advice on Learning and Training opportunities

Ambiguity of role of Training Department viz a vie role of ULR	<input type="checkbox"/>
Create too much interest in Learning and Training within the workforce	<input type="checkbox"/>
Amount of lost production/service provision in facilitating ULR activity	<input type="checkbox"/>
Amount of lost production/service provision in facilitating Learning and Training activity	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>
.....	
.....	
.....	

21 What do you experience as barriers to ULR activity?

Lack of employee support	<input type="checkbox"/>
Lack of senior management team support	<input type="checkbox"/>
Lack of Line Manager support	<input type="checkbox"/>
Lack of union support	<input type="checkbox"/>
Lack of external funding	<input type="checkbox"/>
Lack of time	<input type="checkbox"/>
Lack of other resources eg space, computer access	<input type="checkbox"/>
Conflict between Training Department and ULRs	<input type="checkbox"/>
Lack of Learning agreement	<input type="checkbox"/>
Lack of learning committee	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>
.....	
.....	
.....	

22 What are your future hopes for ULR activity?

.....
.....
.....
.....
.....

23 What are your fears for ULR activity?

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.....
.....

24 Any other comments.

.....
.....
.....
.....
.....

Please return your completed questionnaire using the reply-paid envelope provided.

Thank you for your time and co-operation in completing this questionnaire.

Employer Survey Cover Letter

To Head of Human Resources

I am a member of the HRM Division, Lancashire Business School, University of Central Lancashire, Preston and I am currently completing a North West Development Agency (NWDA) funded research project.

The aim of the research is to identify the baseline of Union Learning Representative (ULR) activity within the region. The findings will be used to inform **future bids for funding to develop, sustain and support Union Learning Representative** activity within the North West Region.

A crucial part of the research is to survey employers, to gather their views on the impact of Union Learning Representative Activity. To achieve this, please find attached a questionnaire for you to provide me with your opinions. I really need your help to get a clear picture of the activity and related issues **within the North West**. With this in mind, I hope that you will be able to take part in the survey by completing the attached questionnaire.

Completed questionnaires should be returned to the University in the enclosed pre-paid enveloped by **30th September 2005**. If you have any queries about the questionnaire then please contact me.

I do hope you will be able to support this initiative and I look forward to receiving your response in the near future.

Many thanks

Alison Hollinrake

Contact Details:

Contact can be made with Alison:

by 'phone: 01772 894781 or 07811 025 355 or email: ahollinrake@uclan.ac.uk

Appendix 7: Focus Groups

Schedule of Focus Group Events:

FG	Date	Union	Venue
1	05.10.04	PCS	Liverpool
2	01.11.04	PCS	UCLan
3	07.12.04	GPMU	Daresbury
4	21.12.04	Unison	Manchester
5a*	25.01.05	Unison	Birkenhead
6	09.02.05	BFAWU	Bolton
7	10.02.05	UCATT	Liverpool
5b*	28.02.05	Unison	Birkenhead
8	29.04.05	GMB	Warrington
9	23.09.05	Amicus	Manchester

* only 1 attendee so further event 28.02.05

Sample Joining Instructions

All Liverpool and Manchester ULRs (PCS)

Dear

RESEARCH FOR UNION LEARNING AND SKILLS FUND

The University of Central Lancashire has been commissioned, by the TUC and North West Development Agency, to carry out research around the development of a fund to which Trade Unions would apply for assistance. They had a good response to their initial survey with a high number of PCS ULRs responding.

In order to take the research forward I have been asked by the TUC to set up two focus groups. One for ULRs in the Liverpool/Manchester area and one for ULRs in Lancashire.

The aims of the focus groups will be to: -

- Look at what resources/services ULRs would like to see developed in the North West to assist them in being effective and for the union to consider how effectively it is reaching/developing ULR structures across its membership.
- To look at barriers to learning and skill development and how a regional Trade Union fund might tackle these barriers.

Alison Hollinrake, the researcher from the University of Central Lancashire and a member of the NW TUC Learning Services Team, will attend the focus groups and all information gathered will be fed into the research.

Details of the focus group for Liverpool/Manchester ULRs are as follows: -

DATE: TUESDAY, 5th OCTOBER 2004

TIME: 10.00a.m. – 12 NOON

VENUE: PCS NWRC, 4TH FLOOR, 35-37 DALE STREET, LIVERPOL

Please confirm your attendance by no later than **THURSDAY, 30TH SEPTEMBER 2004.**

Should you require any further information please contact Alison Hollinrake on 01772 894781.

Yours sincerely

MARIE MORGAN

Learning Services Officer

Encl. Map

Union Learning Representative Baseline Research Report

2004

Focus Group Event 01 – PCS 5th October 2004

Discussion schedule

Key Issues from Findings:

Questionnaires:

98 issued

58 returns

= 59% response rate for this union.

1. *New role within the union:*
 - a. *Does the union structure support the ULR role?*
 - b. *How could this be improved?*

2. *Colleagues' responses to having ULRs within the organisation?*
Colleagues:

3. *Within your ULR role do you recruit new members to the union?*

4. *Has being a ULR met your expectations?*

5. *Issues that arise from also having other Union function responsibilities and the fact that many of you represent 100+ colleagues.*

6. *We are interested in the responses to the existence of Employer/Union Learning Agreement, form, how developed, implementation in practice, does rhetoric match reality?*

7. *If no agreement in place – impact of this?*

8. *Preparation for role?*
 - a. *Sufficient*
 - b. *On reflection and having gone back into the workplace following your initial training, what else do you need to be effective?*

9. *Continuing development within the role:*
 - a. *Knowledge and understanding to fulfil duties?*
 - b. *Opportunities to meet with other ULRs to share information?*

10. *43 of 58 respondents give unpaid time to the activity which appears to match the paid time given. What causes the need to give unpaid time to the role. Specific activity this relates to?*

11. *Resources/ Support from own union, TUC = 'satisfied'*
 - a. *Little information given on additional support required, can you be more specific?*
 - b. *Attend TUC Learning Services events, how are these useful?*

12. *Barriers to ULR Activity:*

13. *Longer term aims:*
 - a. *Within ULR role: A number of respondents stated 'professional service provision' can you clarify what this means?*
 - b. *For self and colleagues: Better Education/More self development any examples of this?*

14. *Where PCS wants to be as regards ULR activity?*
 - a. *How will you recruit projected number of ULRs*
 - b. *Are ULRs involved in encouraging others to take on the ULR role?*
 - c. *Support you require from TUC Learning Services in meeting these targets?*

15. *Any other issues?*

Union Learning Representative Baseline Research Report

2004

Focus Group Event 09 – GMB

29th April 2005

Discussion Schedule

05FGGMB01

Key Issues from Findings:

Questionnaires:

175 issued

67 returns = 38 % for this union

1. Becoming a ULR
2. ULR Training
 - a. Initial
 - b. Further development
3. ULR Activity in the workplace
 - a. Support
 - b. Barriers
4. Impact of statutory rights for paid time to train and practice role
5. Other support for ULR activity
 - a. Union
 - b. Other arrangements
6. Barriers to ULR activity
7. Personal achievements from ULR Activity
8. Future hopes for ULR role

9. Fears for ULR role

10. Other Issues.

Alison Hollinrake - April 2005

Focus Groups - Aide Memoir

Questionnaires:

Issued = ?

Returns = ?

= ??% response rate for this union.

1. Becoming a ULR
 - a. *New role within the union*
 - b. *Does the union structure support the ULR role?*
 - c. *How could this be improved?*
 - d. *Has being a ULR met your expectations?*

2. ULR Training
 - a. *Preparation for role?*
 - b. *Sufficient*
 - c. *On reflection and having gone back into the workplace following your initial training, what else do you need to be effective?*
 - d. *Continuing development within the role:*
 - e. *Knowledge and understanding to fulfil duties?*
 - f. *Opportunities to meet with other ULRs to share information?*

3. ULR Activity in the workplace
 - a. *Support*
 - i. *We are interested in the responses to the existence of Employer/Union Learning Agreement, form, how developed, implementation in practice, does rhetoric match reality?*
 - ii. *If no agreement in place – impact of this?*
 - b. *Barriers*
 - c. *Colleagues' responses to having ULRs within the organisation?*
 - d. *Within your ULR role do you recruit new members to the union?*
 - e. *Issues that arise from also having other Union function responsibilities and the fact that many of you represent 100+ colleagues.*

4. Impact of statutory rights for paid time to train and practice role
 - a. *Substantial numbers of respondents give unpaid time to the activity which appears to match the paid time given. What causes the need to give unpaid time to the role.*
 - b. *Specific activity this relates to?*

5. Other support for ULR activity
 - a. Union
 - i. Resources/ Support from own union, TUC*
 - ii. Little information given on additional support required, can you be more specific?*
 - b. If you attend TUC Learning Services events, how are these useful?*
 - c. Other arrangements*

6. Barriers to ULR activity

7. Personal achievements from ULR Activity

8. Future hopes for ULR role
 - a. For self and colleagues: Better Education/More self development any examples of this?*

9. Fears for ULR role

10. Other Issues.
 - a. Where 'union' wants to be as regards ULR activity?*
 - b. How will you recruit projected number of ULRs*
 - c. Are ULRs involved in encouraging others to take on the ULR role?*
 - d. Support you require from TUC Learning Services in meeting these targets?*

11. Any other issues?

12. Close
 - a. Thanks*

 - b. Next stage*

Appendix 8: LSC (Learning and Skills Councils) Interviews

(Header for the original had following logos inserted: TUC Learning Services North West Region, NWDA, UCLan)

TUC Learning Services Northwest Region

Union Learning Representative Baseline Research Project 2004/05

05 LSC DISCUSSION SCHEDULE

Aim:

To identify North West Region LSCs' view of ULR activity, from experience to date and how LSCs would like to see it progress.

Areas for discussion:

1. How long has your LSC (formerly TEC) been working with TUC Learning Services North West Region?
2. How would you describe that relationship?
3. Source of funding that LSC provides for TUC Learning Services North West Region?
4. Key aim and objectives for the funding that has been provided to date to facilitate ULR activity?
5. How is funding allocation decided upon (process)?
6. Do you consider your funding for ULR activity to be proactive or reactive?
7. What do you consider to have been the best return for the funding?
8. What is your evaluation of the effectiveness of funded projects in support of ULR activity?
9. How is the impact of your funding for ULR related activities evaluated (process)?
10. What do you consider enhances the effectiveness of funded ULR projects in your LSC area?
11. What do you consider inhibits the effectiveness of funded ULR projects in your LSC area?
12. What is your view of employer support for ULR activity in the area?

13. Is this replicated within your own organisation?
14. How are TUC Learning Services North West Region represented within your organisation?
15. With specific reference to the TUC and LSC Protocol (March 2005), how do you envisage this will be facilitated within your region?
16. Why do you think TUC Learning Services North West Region, are not featured in the case studies within the Protocol document?
17. What is your opinion as regards the parity of experience of relationship with funding agencies for different sectors/members of the employment relationship?
18. Are there any other issues you would like to discuss?

References:

LSC, (2005), Trades Union Congress and Learning and Skills Council Protocol, Coventry, LSC

Union Learning Representative Baseline Research Project

2004-2006

06 LSC discussion schedule

Aim:

To identify North West Region LSCs' view of ULR activity, from experience to date and how LSCs would like to see it progress.

Areas for discussion:

1. How long has your LSC (formerly TEC) been working with TUC Learning Services North West Region?
2. How would you describe that relationship?
3. Source of funding that LSC provides for TUC Learning Services North West Region?
4. Key aim and objectives for the funding that has been provided to date to facilitate ULR activity?
5. How is funding allocation decided upon (process)?
6. Do you consider your funding for ULR activity to be proactive or reactive?
7. What do you consider to have been the best return for the funding?
8. What is your evaluation of the effectiveness of funded projects in support of ULR activity?
9. How is the impact of your funding for ULR related activities evaluated (process)?
10. What do you consider enhances the effectiveness of funded ULR projects in your LSC area?
11. What do you consider inhibits the effectiveness of funded ULR projects in your LSC area?

12. What is your view of employer support for ULR activity in the area?
13. Is this replicated within your own organisation?
14. How are TUC Learning Services North West Region represented within your organisation?
15. With specific reference to the TUC and LSC Protocol (March 2005), how do you envisage this will be facilitated within your region?
16. Why do you think TUC Learning Services North West Region, are not featured in the case studies within the Protocol document?
17. What is your opinion as regards the parity of experience of relationship with funding agencies for different sectors/members of the employment relationship?
18. Are there any other issues you would like to discuss?

References:

LSC, (2005), Trades Union Congress and Learning and Skills Council Protocol, Coventry, LSC

Appendix 9: S2 ULR Survey

S2 Union Learning representative Survey (ULR)

Section & question no.	Revision
<p>1: PERSONAL AND WORKPLACE DETAILS</p> <p>1.5</p> <p>1.7</p> <p>1.14</p> <p>1.16</p>	<p>New variable of 'less than one year' added from feedback from pilot.</p> <p>Ethnicity variables. Excluded at T1</p> <p>The variables were challenged by a respondent to the pilot who thought respondents might be confused by the options available. It was suggested to ask them to name the main function of their workplace. The options given could then be coded up. This idea was rejected as the variables given were those used at T1.</p> <p>This was a new question that aimed to get a feel for union density in the ULRs' workplace.</p>
<p>2: BECOMING A UNION LEARNING REPRESENTATIVE (ULR)</p> <p>2.1</p> <p>2.11</p> <p>2.4</p> <p>2.5 & 2.6</p> <p>2.7 & 2.8</p>	<p>Revised rubric for less than 1 year variable</p> <p>New question to enable xref to T1 respondents</p> <p>From pilot, to improve clarity: rubric revised from 'Please select all that applies' to 'tick more than one box if necessary.' Applied to all appropriate questions.</p> <p>Variables drawn from T1 responses</p> <p>'before' and 'currently' emboldened for emphasis</p> <p>New questions. Feedback from pilot to use opportunity to identify if ULRs have interest/affinity with TUs in general.</p>

<p>3 UNION LEARNING REPRESENTATIVE (ULR) TRAINING</p> <p>1.5 & 3.6</p> <p>3.8</p> <p>3.10 – 3.11</p> <p>3.12</p>	<p>New questions identified from T1 findings/ focus group discussions</p> <p>Variables from T1 responses</p> <p>As with 3.5 & 3.6 above</p> <p>New question to inform TU Education</p>
<p>4: UNION LEARNING REPRESENTATIVE (ULR) ACTIVITY IN THE WORKPLACE</p> <p>4.5</p> <p>4.6</p> <p>1.7 - 4.9</p> <p>4.13</p> <p>4.15</p> <p>4.18 : 4.22 & 4.23</p> <p>4.24 - 4.26</p>	<p>T1 Qs 4.4 & 4.5 deleted</p> <p>Additional variables drawn from T1 responses</p> <p>Last 2 ‘recruit new members’ & support union organisation’ informed by pilot to assess if ULRs see recruitment and organisation as one of their roles.</p> <p>‘managed’ changed to ‘the opportunity’ appears more positive.</p> <p>Variables drawn from T1 responses</p> <p>Revised wording</p> <p>T1 4.16 deleted</p> <p>‘Impact’ had become a flavour of the month criterion for LSC to measure ULR activity.</p> <p>Variables drawn from T1 responses</p> <p>New questions aim to track trends over time.</p>
<p>5. ARRANGEMENTS THAT SUPPORT YOUR UNION LEARNING REPRESENTATIVE ROLE</p>	<p>New title for section combines T1 section 5 & 6</p>

5.3	New question to gather data on content of learning agreements
5.6	Qs on time moved to new section 6 re: Statutory Rights
5.7	Variables drawn from T1 responses
5.12	New question to gather data on function of working groups
5.14 & 5.15	TUC removed from this question
5.19 & 5.20	New Qs to gather data on TUC
6. STATUTORY RIGHTS FOR UNION LEARNING REPRESENTATIVE ACTIVITY	Variables drawn from T1 responses
6.1 – 6.7	Battery of new questions to gather data on statutory rights for ULRs
	Space to respond increased, informed by pilot.
7. BARRIERS THAT INHIBIT YOUR UNION LEARNING REPRESENTATIVE ROLE	
7.1	Variables drawn from T1 responses
8. PERSONAL ACHIEVEMENT	
8.3 & 8.4	New questions to gather data that can be matched to responses to these questions at T1 focus groups and other stakeholder interviews.

UNIVERSITY OF CENTRAL LANCASHIRE

TUC LEARNING SERVICES NORTHWEST REGION

BASELINE RESEARCH PROJECT

**UNION LEARNING REPRESENTATIVE
SURVEY 2006**

Please indicate your response by crossing one box per question, unless otherwise specified. There is an opportunity to add your own comments at the end of the questionnaire. If additional space is required please use the back page, indicating the number of the question next to your answer.

Please complete and return to:

Alison Hollinrake

Department of Strategy and Innovation

University of Central Lancashire

Preston

PR1 2HE

1	PERSONAL AND WORKPLACE DETAILS
----------	---------------------------------------

1.1 YOUR NAME:

1.2 JOB TITLE:

1.3 UNION YOU BELONG TO

1.4 NAME AND ADDRESS OF WORKPLACE.....
.....
.....

1.5 How long have you worked in your present role? Less than a year 1-3 years 4-6 years
7-9 years 10+ years

1.6 Are you Female?
Male?

1.7 Which of these best describes your ethnic group?

Black African	<input type="checkbox"/>	Asian Indian	<input type="checkbox"/>
Black Caribbean	<input type="checkbox"/>	Asian Pakistani	<input type="checkbox"/>
Black British	<input type="checkbox"/>	Asian Bangladeshi	<input type="checkbox"/>
—	—	—	—

White British

Asian Chinese

White European
other

Other (please specify)

Asian British

.....

1.8 How old are you?

16-21

26-35

46-55

22-25

36-45

56+

1.9 Do you work

Full Time?

Part time?

1.10 On average, how many hours do you work per week?

1-10 hours

31-40 hours

11-20 hours

41-50 hours

21-30 hours

50+ hours

1.11 Is there shift working at your workplace?

Yes

Please go to Q 1.12

No

Please go to Q 1.13

1.12 What shift patterns exist at your workplace?

Days

Nights

Evenings

Double days

1.13 Is your work place

Public Sector?	<input type="checkbox"/>	Private Sector?	<input type="checkbox"/>
Voluntary Sector?	<input type="checkbox"/>	Don't know	<input type="checkbox"/>

1.14 Which sector best describes the nature of your workplace?

Agriculture & Fishing	<input type="checkbox"/>	Transport, Storage & Communications	<input type="checkbox"/>
Energy & Water	<input type="checkbox"/>	Banking, Finance & Insurance	<input type="checkbox"/>
Manufacturing	<input type="checkbox"/>	Public administration, Education & Health	<input type="checkbox"/>
Construction	<input type="checkbox"/>	Other (Please specify below)	<input type="checkbox"/>
Wholesale & Retail	<input type="checkbox"/>		
Hotels & Restaurants	<input type="checkbox"/>		

1.15 How many employees are there (approximately) :

- On your site?	<input type="text"/>	- In your organisation?	<input type="text"/>
-----------------	----------------------	-------------------------	----------------------

1.16 What percentage of employees are members of trades unions (approximately):

- On your site?	<input type="text"/>	%	- In your organisation?	<input type="text"/>	%
-----------------	----------------------	---	-------------------------	----------------------	---

PLEASE TURN PAGE

2	BECOMING A UNION LEARNING REPRESENTATIVE (ULR)
----------	---

2.1 How long have you served as a ULR?

Less than 1 year 1-2 years 3-6 years

Please go to Q 2.2

2.11 Did you complete & return the 2004/05 survey?

Yes No

2.2 How did you become interested in being a ULR?

Another Learning Representative	<input type="checkbox"/>	Union Officer/Senior Representative	<input type="checkbox"/>
Employer / Manager	<input type="checkbox"/>	Other (Please specify below)	<input type="checkbox"/>
Trades Union Congress (TUC)	<input type="checkbox"/>	

2.3 How did you become a ULR?

Was nominated	<input type="checkbox"/>	Other (Please specify below)	<input type="checkbox"/>
Elected	<input type="checkbox"/>	
Volunteered	<input type="checkbox"/>		

**2.4 What attracted you to the role?
Tick more than one box if necessary.**

Opportunity to help others	<input type="checkbox"/>	Extra challenge	<input type="checkbox"/>
To gain more experience and knowledge of learning and development	<input type="checkbox"/>	Personal development	<input type="checkbox"/>
Opportunity to become active in Union	<input type="checkbox"/>	Develop own work-related skills	<input type="checkbox"/>
Curious about the ULR role	<input type="checkbox"/>	Persuaded by ULR	<input type="checkbox"/>

	—		—
Already carrying out ULR duties	<input type="checkbox"/>	Nobody in ULR position	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>		
.....			
.....			

**2.5 Which, if any, of the following Union functions did you carry out before you were a ULR?
Tick more than one box if necessary.**

Steward	<input type="checkbox"/>	Equal Opportunities Representative	<input type="checkbox"/>
Health & Safety Representative	<input type="checkbox"/>	Organiser	<input type="checkbox"/>
Convenor	<input type="checkbox"/>	None	<input type="checkbox"/>
Other Function (Please specify below)	<input type="checkbox"/>	Branch Office role (please specify)	<input type="checkbox"/>
.....		

**2.6 Do you currently have other Union Function responsibilities?
Tick more than one box if necessary.**

Steward	<input type="checkbox"/>	Equal Opportunities Representative	<input type="checkbox"/>
Health & Safety Representative	<input type="checkbox"/>	Organiser	<input type="checkbox"/>
Convenor	<input type="checkbox"/>	None	<input type="checkbox"/>
Other Function (Please specify below)	<input type="checkbox"/>	Branch Office role (please specify)	<input type="checkbox"/>
.....		

**2.7 Has becoming a ULR increased your

interest in the trades union
movement?**

Yes No

2.8 Has your ULR experience encouraged Yes No

you to consider standing for other union roles/office?

3 UNION LEARNING REPRESENTATIVE (ULR) TRAINING

3.1 Did you receive training to become a ULR? Yes *Please go to Q 3.2*
 No *Please go to Q 3.5*

3.2 Which organisation ran the initial learning rep training that you undertook?

Your Union

TUC Education

Other (Please specify)

.....

...

3.3 How long was your initial learning rep training?

3 days 10 days

5 days Other (Please specify)

.....

3.4 How satisfied were you with your initial learning rep training?

Very Satisfied Satisfied Dissatisfied Very Dissatisfied

3.5 Have you been subject to a cancellation of a course you had booked to attend?

Yes

Please go to Q 3.6

No

Please go to Q 3.7

3.6 What reason were you given for the cancellation?

.....

3.7 Did you complete the training?

Yes

Please go to Q 3.9

No

Please go to Q 3.8

3.8 What were the reasons for not completing the training. Tick more than one box if necessary.

It was not what I expected

It was not scheduled at a convenient time

Not given time to attend by employer

Not supported by members

Course cancelled

Other (Please specify)

.....

.....

**3.9 Which, if any, of the following courses for learning reps have you been on?
Tick more than one box if necessary.**

	Provider		
	Your Union	TUC Education	Other (Please specify)
Basic Skills Awareness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Information, Advice and Guidance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Investors in People	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Workforce Development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appraisal Systems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Learndirect Levels 1&2 Support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Information, Advice & Guidance NVQ	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mentoring	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication and Presentation Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

.....

3.10 Have you been subject to a cancellation of a course you had booked to attend?

Yes *Please go to Q 3.11*

No *Please go to Q3.12*

3.11 What reason were you given for the cancellation?

.....

3.12 What further training and development would you like to receive?

.....
.....

.....
.....

.....
.....

.....
.....

PLEASE TURN PAGE

4 UNION LEARNING REPRESENTATIVE (ULR) ACTIVITY IN THE WORKPLACE

4.1 Are you aware of other ULRs within your workplace that belong to 'your' Union? Yes Please go to Q 4.2
 No Please go to Q 4.3

4.2 How many other ULRs within your workplace belong to your union?

4.3 Are you aware of other ULRs within your workplace that belong to 'other' unions? Yes
 No

4.4 How many Union members do you represent in your workplace?

1-20	<input type="checkbox"/>	21-40	<input type="checkbox"/>	41-60	<input type="checkbox"/>
61-80	<input type="checkbox"/>	81-100	<input type="checkbox"/>	100+	<input type="checkbox"/>

**4.5 In your role as ULR, do you:
 Tick more than one box if necessary.**

- Carry out training needs analysis
- Offer one to one advice to members about learning opportunities
- Signpost members to other sources of advice and guidance
- Provide advise/support re: BasicSkills/ Skills for Life
- Represent members' views on training and learning at appropriate forums
- Promote learning in the workplace to my employer
- Negotiate with my employer for training and learning opportunities
- Collate information in relation to workplace training and learning opportunities
- Collate information in relation to Government training and learning initiatives

- Arrange/broker learning opportunities with local providers
- Monitor quality of provision
- Assist members to access funding
- Support innovative workplace developments e.g. Union Learning Fund Projects
- Help to run a learning centre
- Support members from other unions in the workplace
- Support colleagues who are non-union members
- Recruit new union members
- Support union organisation in your workplace
- Other (Please specify)

.....

4.6	Have you had the opportunity to put most of your	Yes <input type="checkbox"/>	<i>Please go to Q 4.7</i>
	training into practice since you completed your initial	No <input type="checkbox"/>	<i>Please go to Q 4.8</i>
ULR training?			

4.7	What do most people come to you for?
	Tick more than one box if necessary.

- Advice/Information/Guidance
- Training/Learning Opportunities/Skills
- Advice on Basic Skills/Skills for Life
- Funding
- To complete a training needs analysis

Other (Please specify)

4.8 Why haven't you had the opportunity to practice your ULR activities?

Tick more than one box if necessary.

I have just completed my training	<input type="checkbox"/>	Not sure what to do	<input type="checkbox"/>
Lack of support from organisation/employer	<input type="checkbox"/>	Lack of demand from members	<input type="checkbox"/>
No training suite/learning centre in place	<input type="checkbox"/>	Moved premises	<input type="checkbox"/>
Not given time by employer	<input type="checkbox"/>	Lack of support from own Union	<input type="checkbox"/>
Not given enough time by employer	<input type="checkbox"/>	Lack of support from Branch	<input type="checkbox"/>
No interest from members/opportunities not there	<input type="checkbox"/>	Carried out at a higher level in Union	<input type="checkbox"/>
Not enough training knowledge	<input type="checkbox"/>	Lack of support from TUC	<input type="checkbox"/>
		Financial restraints	<input type="checkbox"/>
Other (Please specify)	<input type="checkbox"/>		

.....

4.9 How have other non-union colleagues, if any, used you in your role as ULR?
Tick more than one box if necessary.

Information & advice re: training & learning	<input type="checkbox"/>	Information & advice re: training providers	<input type="checkbox"/>
Information & advice re: Basic Skills/Skills for Life	<input type="checkbox"/>	Other (Please Specify)	<input type="checkbox"/>
Discussions/negotiations with employer	<input type="checkbox"/>		

.....

Non-union members can use learning centre

—

4.10 Do you get involved in assessing the needs of learners in your workplace?

Yes
No

4.11 Have you undertaken a learning needs analysis at your workplace?

Yes *Please go to Q 4.12*
No *Please go to Q 4.13*

4.12 How have you assessed learning needs? Tick more than one box if necessary.

FORMALLY

INFORMALLY

Survey
Via formal meetings
One to one discussions with colleague
Other (Please specify below)
.....

Ad-hoc meetings
'in passing'
Other (Please specify below)
.....

4.13 If you have not undertaken a learning needs analysis, who performs this task within your workplace? (job title)

.....
.....

4.14 Once identified, are learning needs addressed within your workplace?

Always
Sometimes
Never

4.15 In terms of improving learning opportunities in the workplace, do you feel that your activity has:

Had very little impact	<input type="checkbox"/>
Had some impact	<input type="checkbox"/>
Had considerable impact	<input type="checkbox"/>

4.16 How many of your colleagues, if any have you assisted to get training and development opportunities?

1-5	<input type="checkbox"/>	6-10	<input type="checkbox"/>
11-15	<input type="checkbox"/>	16+	<input type="checkbox"/>

4.17 Do you keep records of contacts with colleagues?

Always	<input type="checkbox"/>	<i>Please go to Q4.18</i>
Sometimes	<input type="checkbox"/>	<i>Please go to Q4.18</i>
Never	<input type="checkbox"/>	<i>Please go to Q4.19</i>

4.18 What format are these records in? Tick more than one box if necessary.

Paper	<input type="checkbox"/>
Paper based in a filing system	<input type="checkbox"/>
Computerised/email/database Files	<input type="checkbox"/>
Hard copy files, some electronic files, some paper files	<input type="checkbox"/>
Other (Please specify below)	<input type="checkbox"/>
.....	

4.19 Do you monitor the progress of colleagues on Training and Development programmes?

Always *Please go to Q4.20*
 Sometimes *Please go to Q4.20*
 Never *Please go to Q4.21*

4.20 How do you monitor the progress of colleagues on Training and Development programmes?

FORMALLY

De-brief
 Filling in a form
 Other (Please specify below)

.....

INFORMALLY

Discussion
 Other (Please specify below)

.....

4.21 Do you have to provide reports on your ULR activities?

Yes *Please go to Q4.22*
 No *Please go to Q4.24*

**4.22 Who do you report your ULR activities to?
 Tick more than one box if necessary.**

Branch
 Training Department/HR Department
 Manager/Supervisor
 ULR meeting/Working Group
 Convenor/Senior Steward
 Learning Centre Co-ordinator

Full-time Officer

TUC Project Worker

Own Union Project Worker/Learning Officer

Other(please specify below)

.....

**4.23 How do you report your ULR activities?
Tick more than one box if necessary.**

Verbally at Branch Meetings

Written Reports

By Email

Formal presentation(s)

Other(please specify below)

.....

**4.24 Have you been practising as a ULR
since completing your initial training?**

Yes

No

Please go to Q 4.25

Please go to section 5

4.25 Has the nature of your ULR role

Yes

No

changed over that time?

— Please go to —
section 5

4.26 In what ways has the role changed?

Increased ULR activity: (please give examples below)

.....

.....

.....

.....

Decreased ULR activity: (please give examples below)

.....

.....

.....

.....

Other changes: (please give examples below)

.....

.....

.....

.....

5	ARRANGEMENTS THAT SUPPORT YOUR UNION LEARNING REPRESENTATIVE ROLE
----------	--

5.1 Does your workplace have an Employer/Union Learning Agreement?

Yes *Please go to Q 5.2*
No *Please go to Q 5.4*

5.2 When was this agreement accepted?.....

5.3 Which of the following issues are covered by the Learning Agreement?

Tick more than one box if necessary.

- Building a partnership in the workplace
- To encourage the staff within your workplace to participate in learning
- To identify Skills for Life/Basic Skills needs within the workplace
- To provide access to lifelong learning
- To establish a learning centre within the workplace
- Define allocation of paid time for ULR activity in line with statutory rights
- Define facilities allocated to support ULR activity
- Define colleagues' access to ULR
- To work with organisations such as TUC Learning Services to ensure the

partnership is a success

Other(please specify below)

.....

**5.4 Is there a working group set up at your workplace
for the employer and ULRs?**

Yes *Please go to Q 5.5*

No *Please go to Q 5.8*

5.5 How often does this group meet

Weekly

Fortnightly

Monthly

Other

(Please specify)

.....

5.6 Please state the job titles of those who attend the working group meeting?

Tick more than one box if necessary.

- | | |
|---|--------------------------|
| ULR(s) | <input type="checkbox"/> |
| Representative from Training & Development Department | <input type="checkbox"/> |
| Representative from HR/Personnel Department | <input type="checkbox"/> |
| Representative from Operations/General staff | <input type="checkbox"/> |
| Line Manager | <input type="checkbox"/> |
| TUC Project Worker | <input type="checkbox"/> |
| Convenor/Senior Steward | <input type="checkbox"/> |
| Full time Officer | <input type="checkbox"/> |
| Senior Management | <input type="checkbox"/> |
| Representatives from Learning provider(s) | <input type="checkbox"/> |
| Other(please specify below) | <input type="checkbox"/> |
| | |

5.7 Please state the functions of this working group:

Tick more than one box if necessary.

- | | |
|------------------------------------|--------------------------|
| Monitoring ULR activity | <input type="checkbox"/> |
| Monitoring learning needs analysis | <input type="checkbox"/> |
| Prioritising learning needs | <input type="checkbox"/> |
| Management of Learning Centre | <input type="checkbox"/> |

Monitoring progress of learners	<input type="checkbox"/>
Monitoring achievement of recognised qualifications	<input type="checkbox"/>
Identifying and accessing external funding for learning activity	<input type="checkbox"/>
Identification and monitoring standard of learning providers	<input type="checkbox"/>
Other(please specify below)	
.....	

5.8 Are there any informal arrangements for ULRs to meet?

Yes	<input type="checkbox"/>	<i>Please go to Q 5.9</i>
No	<input type="checkbox"/>	<i>Please go to Q 5.10</i>

5.9 What other informal arrangements are made for ULRs to meet? Please provide details.

.....

.....

.....

.....

**5.10 What resources are you given to help you fulfil your ULR role within the workplace?
Tick more than one box if necessary.**

Time	<input type="checkbox"/>	Computer access for email/internet	<input type="checkbox"/>
Office	<input type="checkbox"/>	Learning resources	<input type="checkbox"/>
Telephone	<input type="checkbox"/>	Learning centre	<input type="checkbox"/>
Network	<input type="checkbox"/>	Support from Union	<input type="checkbox"/>
Administrative support	<input type="checkbox"/>	Other (Please specify)	<input type="checkbox"/>
Support from TUC	<input type="checkbox"/>	

5.11 How would you rate your satisfaction with these resources?

	Very				Very
	Satisfied	Satisfied	Dissatisfied	Dissatisfied	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

5.12 How satisfied are you with the support from your own Union?

	Very				Very
	Satisfied	Satisfied	Dissatisfied	Dissatisfied	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

5.13 What additional support would you like to receive?

.....
.....
.....
.....
.....

5.14 How satisfied are you with the support from the TUC?

	Very				Very
	Satisfied	Satisfied	Dissatisfied	Dissatisfied	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

5.15 What additional support would you like to receive?

.....
.....
.....
.....
.....

5.16 Have you attended ULR events provided by TUC learning services?

Yes	<input type="checkbox"/>	<i>Please go to Q 5.17</i>
No	<input type="checkbox"/>	<i>Please go to Q 5.20</i>

5.17 How many ULR events have you attended that were provided by TUC Learning Services?

1-3	<input type="checkbox"/>	4-6	<input type="checkbox"/>
7-9	<input type="checkbox"/>	10+	<input type="checkbox"/>

5.18 Were the events useful?

Yes Please go to Q 5.19
No Please go to Q 5.20

5.19 How were the events useful?

Tick more than one box if necessary.

Networking opportunity & sharing experiences

Get help and advice from others

More scope to help by gaining knowledge

Greater understanding of ULR duties & develop skills

Other (Please specify) _____
.....

5.20 Please provide details of any other arrangements that support your ULR activity?

Tick more than one box if necessary.

Courses to improve skills and knowledge of ULR role

Networking meetings by TUC/Learning Rep Forums

Newsletters/emails/magazines

Acknowledgement of role

Other (Please specify) _____
.....

6.1 Is your employer adhering to the requirements of the statutory rights for ULRs? (ACAS,2003) Yes *Please go to Q 6.3*
 No

6.2 What action has your union taken to address this?

Tick more than one box if necessary.

Lodged a grievance with your employer	<input type="checkbox"/>	Other (Please specify below)	<input type="checkbox"/>
Raised ETI	<input type="checkbox"/>	
Referred to higher level in Union	<input type="checkbox"/>	
No action taken	<input type="checkbox"/>	

6.3 Has the amount of facility time for ULR activity been agreed as part of the Union/Employer Learning Agreement Yes

No

6.4 How many hours facility time have been agreed for you to fulfil ULR activities?

Is this:

Per week

Per month

(Please specify)

Other

.....

6.5 Is this a separate allocation of facility time to that given for other union duties?

Yes

No

6.6 Do you get paid time to fulfil all your ULR activities?

Yes

No

Do you get paid time for further ULR training?

Yes

No

6.7 What impact does time away from your job on ULR activity have?

For you:

.....
For colleagues:

.....
Your relationship with colleagues:

.....
Your relationship with your line manager

.....

6.8 Do you give unpaid time, outside working hours to ULR activity? Yes *Please go to Q 6.9*
 No *Please go to Section 7*

6.9 On average, how many hours unpaid time do you give to ULR activity?
Is this:

Per week

Per month

Other (Please specify)

.....

7	<i>BARRIERS THAT INHIBIT YOUR UNION LEARNING REPRESENTATIVE ROLE</i>
----------	---

7.1 What barriers inhibit your ULR role. Tick more than one box if necessary.

Lack of time	<input type="checkbox"/>	Lack of employer/ULR agreement	<input type="checkbox"/>
Lack of union member time to contact you	<input type="checkbox"/>	Lack of Learning Agreement	<input type="checkbox"/>
Lack of office space	<input type="checkbox"/>	Learning resources	<input type="checkbox"/>
Lack of telephone access	<input type="checkbox"/>	Learning centre	<input type="checkbox"/>
Lack of networking opportunity	<input type="checkbox"/>	Lack of Committee	<input type="checkbox"/>
Lack of administrative support	<input type="checkbox"/>	Lack of informal arrangements	<input type="checkbox"/>

Lack of computer access for email/internet

Other (Please specify below)

Lack of resources

.....

Lack of access to TUC Project Worker

.....

Lack of skills (please specify below)

.....

.....

.....

.....

8.1 To date, what has been your biggest success as a ULR?

.....
.....
.....

8.2 In the longer term what would you like to achieve?

For you as a ULR:

.....
.....
.....

For you as an individual:

.....
.....
.....

For your colleagues:

.....
.....
.....

8.3 What are your hopes for the ULR role for the future?

.....
.....
.....
.....
.....

8.4 Do you have any fears for the ULR role in the future?

.....
.....
.....
.....
.....

9	<i>ADDITIONAL INFORMATION</i>
----------	--------------------------------------

9.1 If you have any additional comments, please state below.

.....
.....

.....
.....

.....
.....

.....
.....

<p>Please return your completed questionnaire by Friday 17th March using the reply-paid envelope provided.</p>
--

Thank you for your time and co-operation in completing this questionnaire.

TUC Northwest Region

Union Learning Rep. Baseline Research Project

Dear Union Learning Representative

I am a member of the HRM Division, Lancashire Business School, University of Central Lancashire, Preston and I am running a North West Development Agency (NWDA) funded research project on behalf of TUC Learning Services North West Region. This is a follow up to the survey/Focus Group events we completed in 2004/05.

The aim of this survey is to build on what we learnt from the first stage of the project. To help us understand what support ULRs want from TUC Learning Services and to identify what supports you in your role and also what might be preventing you from being as effective as you would like to be in your role. The findings will be used to inform future bids for funding to further develop, sustain and support Union Learning Representative activity within the North West Region.

To achieve this, please find attached a questionnaire for you to provide us with your opinions. The questionnaire is extensive, but as far as possible only requires tick-box responses. So please don't be put off by its bulk! We really need your help to get a clear picture of the activity and related issues within the North West. With this in mind, colleagues from TUC Learning Services North West and I hope that you will take part in the survey by completing the attached questionnaire.

Completed questionnaires should be returned to the University in the enclosed pre-paid enveloped by **17th March 2006**. If you have any queries about the questionnaire or would like some assistance in completing it then please contact either your local TUC Learning Services office and/or your TUC Project Worker, or myself.

I do hope you will be able to support this initiative and I look forward to receiving your response in the near future.

Many thanks

Alison Hollinrake

Contact Details:

TUC Learning Services North West Regional office tel. 0151 236 2321

Greater Manchester, Warrington and Cheshire Team via Debbie Potts
tel. 0161 877 4407

Lancashire and Merseyside Team via John Halligan tel. 0151 236 2321

Contact can be made with Alison:

by 'phone: 01772 894781 or 07811 025 355 or email: ahollinrake@uclan.ac.uk



October 14

Dear Union Learning Representative

Re: TUC Northwest Region - Union Learning Rep. Baseline Research Project

I am currently completing a North West Development Agency (NWDA) funded research project on behalf of TUC Learning Services North West Region.

A questionnaire to gather Union Learning Representatives' opinions was sent to you to complete and return by 17th March 2006. The views of Union Learning Representatives within the region are crucial to the survey and we would like to give you the opportunity to have your say if you have not yet returned the questionnaire.

We appreciate people have very busy lives and this may not have been a priority for you, however we do want you to have a valuable input to the survey. The findings of the survey will inform future bids for funding to develop, sustain and support Union Learning Representative activity within the North West Region. I enclose another copy of the questionnaire for your convenience for you to complete and return in the pre-paid envelope supplied. The questionnaire is extensive, but as far as possible only requires tick-box responses. So please don't be put off by its bulk! No questionnaire will be used individually, all information contained in the questionnaires will be used to construct summary information with a view to recognising trends.

Please could you complete the enclosed questionnaire and return it back by:

12th April 2006.

If you have any queries about the questionnaire or would like some assistance in completing it then please contact either your local TUC Learning Services office and/or your TUC Project Worker, or myself. Please see over for contact details.

I do hope you will be able to support this initiative and I look forward to receiving your response in the near future.

Many thanks

Alison Hollinrake

Contact Details:

TUC Learning Services North West Regional office tel. 0151 236 2321

Greater Manchester, Warrington and Cheshire Team via Debbie Potts

tel. 0161 877 4407

Lancashire and Merseyside Team via John Halligan tel. 0151 236 2321

Contact can be made with Alison:

by 'phone: 01772 894781 or 07811 025 355 or email: ahollinrake@uclan.ac.uk

May 2006

Dear Union Learning Representative

Re: TUC Northwest Region - Union Learning Rep. Baseline Research Project

I wrote to you earlier on this year regarding the above research project on behalf of TUC Learning Services North West. According to my records I don't appear to have had a response from you.

At this stage we have some interesting findings from the Union Learning Representatives we have contacted. In order to support these further we wanted to give you another opportunity to be part of the survey. The findings of the survey will inform future bids for funding to develop, sustain and support Union Learning Representative activity within the North West Region.

I enclose another copy of the questionnaire for your convenience for you to complete and return in the pre-paid envelope supplied. No questionnaire will be used individually, all information contained in the questionnaires will be used to construct summary information with a view to recognising trends. If you are happy to be involved, please could you complete the enclosed questionnaire and return it back by:

26th May 2006.

If you have any queries about the questionnaire or would like some assistance in completing it then please contact either your local TUC Learning Services office and/or your TUC Project Worker, or myself. Please see below for contact details. If however you are no longer active as a Union Learning Representative we would appreciate it if you would confirm this by completing the attached reply form and return in the pre-paid envelope supplied.

Many thanks

Alison Hollinrake

Contact Details:

TUC Learning Services North West Regional office tel. 0151 236 2321

Greater Manchester, Warrington and Cheshire Team via Debbie Potts
tel. 0161 877 4407

Lancashire and Merseyside Team via John Halligan tel. 0151 236 2321

Contact can be made with Alison:

by 'phone: 01772 894781 or 07811 025 355 or email: ahollinrake@uclan.ac.uk



Re: TUC Northwest Region - Union Learning Rep. Baseline Research Project

Name:
Union you belong to:
Date you commenced ULR role?
How long were you active as a ULR?

When did you resign from ULR activity?
Reason for ceasing ULR activity?

Many thanks

Alison Hollinrake



date: 23 February 2006
contact: Dave Eva
direct line: 0151 236 5366
email: deva@tuc.org.uk

Dear Colleague

Thank you very much for taking the time to complete this survey. I realise that you are busy and would like to just take a second to explain why this survey is so important. The work that unions and the TUC do through ULRs has received a great deal of attention because it has enjoyed both success in getting our members access to learning and Government funding. The TUC has commissioned this survey to try and identify what ULRs need in terms of help and support, what barriers ULRs face and to get some insight to how best to represent the needs of ULRs to funding agencies and policy makers. It is important that we find out what your experience is and to feed this into the plans that we and affiliate unions make.

This is a repeat of a survey done nearly 2 years ago - so it is particularly important as it will enable us to see if things have improved or changed.

Thank you again for completing the survey. You will be sent a copy of the final report.

Yours sincerely

A handwritten signature in black ink, appearing to read 'Dave', with a stylized flourish at the end.

Dave Eva

Regional Coordinator

Learning Services North West

Appendix 10: UCU – UCLan Branch

Union Learning Agenda:

Initial Thoughts:

Role of the Union Learning Representative(s)

Promoting:

- Paid time off to learn
- Negotiating paid time off to learn
- Providing information, advice and guidance (as any union rep) specifically on learning and Development issues. Especially at specific times in the employment cycle: induction, probation, redeployment. a
- Offering a confidential service to colleagues to discuss personal and professional development needs, particularly where colleagues are reluctant to discuss these with Line Manager.
- Establishing a Learning Agreement
- Liaising with other unions on site re: Learning Agenda
- Promoting the Equality Agenda with reference to learning and development opportunities
- Ensuring participation and consultation in institute's Learning/Development plans.
- Surveying members' needs/access issues as appropriate
- Expanding ULR base (1:50) and negotiating facilities.
- Ensuring through monitoring that liP is practiced in the spirit in which it is intended

Specific to HE/UCU

- Monitoring impact of shift from ILT to HEA
- Monitoring impact/implementation of HEA strategies

- Proactively promoting UCU view on attempts to shift to mandatory T&L/institution CPD requirements (as in FE, following White Paper)

UCU Ethos:

- Aim for partnership
- Not to replace, undermine existing development provision but to dovetail, promote and guide developments in provision.

Proposed Action Plan:

1. Learning Agreement

- a. Table it at JUCC?
- b. Go to Helen Jones (L&D Manager)
- c. Agree with Unison and Unite (T&G)

2. Monitor:

- a. Learning uptake
- b. Equality monitoring

3. Getting on the Members' Agenda

- a. Propose that initially offer an information session at Teaching, Learning and Research week (Tues?)
- b. Focus Groups by faculty to inform colleagues of learning agenda and to get a broad idea of issues per faculty.

4. Learning Needs Analysis

- a. Develop appropriate Learning Needs Analysis instrument from the FG findings. Ensuring we don't raise expectations beyond what we can provide.

5. Widen ULR activity (currently 2 x UCU trained, 1 x UNISON trained)

Other Branch Issues:

- a. Founding members of North West UCU ULR Community (HE) (Important given UCU Regional and to some extent National situation)
 - i. Uclan, St Martins, Liverpool Hope, Wigan and Leigh (HE provision)
 - ii. AH involvement with unionlearn with the North west TUC and unionlearn (National)

Appendix 11: 2009 Unionlearn ULRs & their Managers National Survey

UNION LEARNING REPRESENTATIVES' SURVEY 2009

You and Your Workplace

1. Your name: _____

2. Name of employer: _____

3. Trade union: _____

4. In which unionlearn region is the site(s) that you cover as a ULR? (please tick one box only)

- | | | | | | |
|----------------------|--------------------------|------------|--------------------------|--------------------------|--------------------------|
| Midlands | <input type="checkbox"/> | Northern | <input type="checkbox"/> | North West | <input type="checkbox"/> |
| Southern and Eastern | <input type="checkbox"/> | South West | <input type="checkbox"/> | Yorkshire and the Humber | <input type="checkbox"/> |

(please tick the appropriate box) **Yes** **No**

5. Are you currently a ULR? *If no, please complete survey on reverse of the covering letter instead of this one*

6. Have you previously held any other union post?

7. In addition to being a ULR do you currently hold any other union post?

8. How long have you been a ULR? _____
Yrs

_____ Mnths

9. Which of the following best describes the sector in which you are a ULR? (please tick one box only)

- | | | | | | |
|----------------------------|--------------------------|------------------------------|--------------------------|--------------------------|--------------------------|
| Manufacturing | <input type="checkbox"/> | Hotels and restaurants | <input type="checkbox"/> | Public administration | <input type="checkbox"/> |
| Electricity, gas and water | <input type="checkbox"/> | Transport and communications | <input type="checkbox"/> | Education | <input type="checkbox"/> |
| Construction | <input type="checkbox"/> | Financial services | <input type="checkbox"/> | Health and social work | <input type="checkbox"/> |
| Wholesale and retail | <input type="checkbox"/> | Other business services | <input type="checkbox"/> | Other community services | <input type="checkbox"/> |

10. Is the site(s) that you cover as a ULR in the:

- | | | | | | | | |
|---------------|--------------------------|----------------|--------------------------|---------------------------------|--------------------------|----------------------------|--------------------------|
| Public sector | <input type="checkbox"/> | Private sector | <input type="checkbox"/> | Not for profit/voluntary sector | <input type="checkbox"/> | Mixed (public and private) | <input type="checkbox"/> |
|---------------|--------------------------|----------------|--------------------------|---------------------------------|--------------------------|----------------------------|--------------------------|

11. Approximately how many people work in the organisation(s) in which you are a ULR?

- | | | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 0-49 | 50-100 | 101-250 | 251-500 | 501-750 | 751-1000 | Over 1000 |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

12. Approximately how many people work at the site(s) that you cover as a ULR?

- | | | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 0-49 | 50-100 | 101-250 | 251-500 | 501-750 | 751-1000 | Over 1000 |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

13. How many other ULRs are active at the site(s) that you cover?

14. Is your union recognised by the employer for collective bargaining? Yes No

15. Approximately what proportion of people that work at the site(s) that you cover as a ULR are members of a trade union?

- | | | | | | | | | | | | | | | | |
|------|--------------------------|--------|--------------------------|--------|--------------------------|--------|--------------------------|--------|--------------------------|-------|--------------------------|----|--------------------------|------------|--------------------------|
| 100% | <input type="checkbox"/> | 80-99% | <input type="checkbox"/> | 60-79% | <input type="checkbox"/> | 40-59% | <input type="checkbox"/> | 20-39% | <input type="checkbox"/> | 1-19% | <input type="checkbox"/> | 0% | <input type="checkbox"/> | Don't know | <input type="checkbox"/> |
|------|--------------------------|--------|--------------------------|--------|--------------------------|--------|--------------------------|--------|--------------------------|-------|--------------------------|----|--------------------------|------------|--------------------------|

Union Learning Representatives – Making a Difference?

- 16. Have you taken** *(please tick the appropriate box)* **Yes** **No**
- The initial ULR training course provided by the TUC?
- The initial ULR training course provided by your own union?
- Other follow on ULR modules?

17. In total, how many hours per week do you usually spend on ULR activities at work and at home ____hrs

18. Over the last 12 months has your activity as a ULR: *(please tick the appropriate box)*

- Decreased a lot Decreased a little Remained the same Increased a little Increased a lot

19. During the last 12 months (or since becoming a ULR) have you:

- | | Yes | No |
|--|--------------------------|--------------------------|
| Provided information and advice to colleagues on learning opportunities? | <input type="checkbox"/> | <input type="checkbox"/> |
| Helped colleagues to get funding for learning? | <input type="checkbox"/> | <input type="checkbox"/> |
| Arranged (or helped to arrange) courses for colleagues? | <input type="checkbox"/> | <input type="checkbox"/> |
| Recruited (or helped to recruit) new members into the union? | <input type="checkbox"/> | <input type="checkbox"/> |
| Conducted a learning needs assessment? | <input type="checkbox"/> | <input type="checkbox"/> |
| Met and/or networked with ULRs from other workplaces? | <input type="checkbox"/> | <input type="checkbox"/> |

20. In your role as ULR, how often do you normally : *(please tick the appropriate box)*

- | | Once a year | Twice a year | Four times a year | More than 4 times a year | Not at all |
|---|--------------------------|--------------------------|--------------------------|---------------------------------|--------------------------|
| Negotiate with managers over learning and training? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Consult with managers over learning and training? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

21. Approximately how many colleagues do you think you have helped

with learning or training in the last 12 months?

22. How many hours per week of paid release from work do you normally receive from your employer for ULR activities?

_____hrs

23. To what extent do you agree or disagree with the following statements regarding your ULR role?

(please tick the appropriate box)

	Agree strongly	Agree	Unsure	Disagree	Disagree strongly
I have adequate access to office facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I have enough training to carry out my ULR role	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I get sufficient support from my union	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am happy to continue in my role as a ULR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My work colleagues are supportive of me	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work pressures restrict my ULR activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am happy with the support I get from unionlearn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

24. Do you feel that your ULR activity has had any of the following effects? *(please tick the appropriate box)*

	Yes	Yes, to a certain extent	No	Unsure
Raised awareness of learning amongst colleagues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Increased interest in union membership	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Improved relationships between the union and managers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- | | | | | |
|--|--------------------------|--------------------------|--------------------------|--------------------------|
| Increased the number of colleagues accessing training | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Increased the amount of training for individual colleagues | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Helped colleagues who had no/little experience of learning | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Improved management/union dialogue on learning | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

25. What has helped you most in your work as a ULR?

26. What else could unionlearn and/or your union do to support you as a ULR?

Working with Colleagues

27. Approximately what proportion of your members has been given paid time-off from normal work duties to undertake training during the past 12 months? (please tick one box only)

- | | | | | | | | |
|-------------------------------|---------------------------------|---------------------------------|---------------------------------|---------------------------------|--------------------------------|-----------------------------|-------------------------------------|
| 100% <input type="checkbox"/> | 80-99% <input type="checkbox"/> | 60-79% <input type="checkbox"/> | 40-59% <input type="checkbox"/> | 20-39% <input type="checkbox"/> | 1-19% <input type="checkbox"/> | 0% <input type="checkbox"/> | Don't know <input type="checkbox"/> |
|-------------------------------|---------------------------------|---------------------------------|---------------------------------|---------------------------------|--------------------------------|-----------------------------|-------------------------------------|

28. Do your members have:

Yes No

The opportunity to discuss individual learning needs with you in normal working time?

A formal entitlement to paid time-off for learning?

29. As a result of your ULR activity in the site(s) that you cover, has the number of your members involved in...

	<i>Increased a lot</i>	<i>Increased a little</i>	<i>Stayed the same</i>	<i>Decreased a little</i>	<i>Decreased a lot</i>
Training leading to nationally recognised vocational or academic qualifications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Apprenticeships	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Job-related training not leading to formal qualifications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Training in basic literacy and numeracy skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Continuing Professional Development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personal interest/leisure courses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

30. To what extent do you agree or disagree with the following statements regarding the attitude of your members to learning? (please tick the appropriate box)

	<i>Agree strongly</i>	<i>Agree</i>	<i>Unsure</i>	<i>Disagree</i>	<i>Disagree strongly</i>
Interest in learning amongst members is high	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Most members want job-related skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Members find it difficult to take up learning opportunities because of pressure of work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Formal qualifications are important to my members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Most members will only go on courses if they are in work time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Training in basic skills is important to my members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

31. Does your employer provide you with: <i>(please tick the appropriate box)</i>	Yes	No
Reasonable time-off to conduct your ULR role?	<input type="checkbox"/>	<input type="checkbox"/>
Reasonable time-off to undergo relevant ULR training?	<input type="checkbox"/>	<input type="checkbox"/>
Reasonable time-off to discuss individual learning needs with your members?	<input type="checkbox"/>	<input type="checkbox"/>
Reasonable time-off to arrange learning or training for your members?	<input type="checkbox"/>	<input type="checkbox"/>
Cover for your regular job while you are conducting your ULR role?	<input type="checkbox"/>	<input type="checkbox"/>
Reduced workload to enable you to conduct your ULR role?	<input type="checkbox"/>	<input type="checkbox"/>

32. At the site(s) that you cover as a ULR: <i>(please tick the appropriate box)</i>	Yes	No	Don't Know
Are the arrangements for ULRs set out in a formal learning agreement?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is there a formal learning partnership involving your union, local providers and the employer?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is there a union learning centre?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is there a working group/committee involving your union and employer to discuss union learning?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does the employer use the Train to Gain brokerage service?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If the employer is using Train to Gain, are you involved in the process?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Has the employer signed the 'Skills Pledge'?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

33. To what extent do you agree or disagree with the following statements regarding the attitude of management to your role as a ULR? *(please tick the appropriate box)*

	<i>Agree strongly</i>	<i>Agree</i>	<i>Unsure</i>	<i>Disagree</i>	<i>Disagree strongly</i>
I get adequate support from senior management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I get adequate support from my line manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Senior management value my ULR activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My line manager values my ULR activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

My line manager gives me enough time for ULR work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Senior management recognise the importance of basic skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Learning is a high priority for my organisation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Senior management is only interested in job specific training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The Recession and Union Learning

34. Has any of the following occurred at the site(s) that you cover as a ULR, wholly or mainly as a result of the current economic recession?

- Employment reductions or lay-offs
 Short-time working
 Wage freeze or reduction
 Non renewal of fixed-term contracts

35. To what extent do you agree or disagree with the following statements regarding the impact of the recession on union supported learning at the site(s) you cover as a ULR? (please tick the appropriate box)

	<i>Agree strongly</i>	<i>Agree</i>	<i>Unsure</i>	<i>Disagree</i>	<i>Disagree strongly</i>
There is a greater focus on job related training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There is reduced demand for learning from members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My line manager is less supportive of my ULR activity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Senior management is less committed to union learning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spending on training has been cut due to the recession	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I have less time for ULR activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

About You

36. Are you Male Female

37. Age: _____yrs

38. Are you employed:

Full-time Part-time Self-employed/freelance

39. To which of these groups do you consider you belong?

White Mixed Asian/Asian Black/Black Chinese or other
 background British British ethnic group

Unionlearn also wishes to survey employers on their experience of working with Union Learning Representatives. If you feel able, we would be most grateful if you would provide the name and address of the manager you work most closely with on union learning matters, who would be willing to participate in this survey

Manager's name:

Manager's role (e.g. Training Manager, HR Manager, line manager)

Manager's full workplace postal address:

Manager's e-mail address

Finally, it may be useful for us to follow up on some of your responses. If you are willing to participate further please give your e-mail address and contact telephone number.

Tel : _____

Email: _____

Thank you for completing this survey. Please return it in the Freepost envelope provided.

UNION LEARNING REPRESENTATIVES' SURVEY 2009

Please complete this questionnaire only if you are no longer an active ULR

1. Your name:

2. Trade union:

3. Are you Male Female

4. Age: _____yrs

5. To which of these groups do you consider you belong?

White Mixed Asian/Asian Black/Black Chinese or other
 background British British ethnic group

6. In which unionlearn region is the site that you covered as a ULR? ... (please tick one box only)

Midlands Northern North West
Southern and Eastern South West Yorkshire and Humberside

(please tick the appropriate box) **Yes** **No**

7. Do you currently hold an official union post?

8. When did you complete your ULR training? _____ (date
in years/yyyy)

9. When did you cease to be active as a ULR? _____ (date
in years/yyyy)

10. Was the site(s) that you covered as a ULR in the:

Public Private Not for profit/voluntary Mixed (public and
sector sector sector private)

11. Was your union recognised by the employer for collective bargaining when you were active a ULR?

Yes No

12. At the site(s) that you covered as a ULR: (please tick the appropriate box)

Yes No *Don't Know*

Were the arrangements for ULRs set out in a formal learning agreement?

Was there a formal learning partnership involving your union, local providers and employer?

Had the employer signed the 'Skills Pledge'?

13. Did any of the following occur at the site you covered as a ULR, wholly or mainly as a result of the current economic recession, when you were active:

Employment reductions or lay-offs

Short-time working

Wage freeze or reduction

Non renewal of fixed-term contracts

14. Could you please explain why you think that you ceased to be active as a union learning representative?

15. To what extent do you agree or disagree with the following statements regarding your time as an active ULR? (please tick the appropriate box)

	Agree strongly	Agree	Unsure	Disagree	Disagree strongly
I felt that I helped members to improve skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I had adequate support from senior management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I was well supported by my trade union	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work pressures restricted my ULR activity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I had adequate support from my line manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My colleagues were supportive of my ULR role	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Members were not really interested in learning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The recession made it difficult for me as ULR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Dear

Union Learning Representatives Survey 2009

Unionlearn's 2009 National Survey of Union Learning Representatives was recently sent out to all ULRs. If you did not receive this or have not had the time to complete this, a further copy of the survey is enclosed.

I fully appreciate the pressures on your time, however, we are very anxious to get the opinions of all ULRs as to the challenges they face in helping union members across the UK to access learning opportunities. Your views are vital in ensuring that Government ministers understand the challenges you face in carrying out your role and in helping us and your unions to give you the support that you need. Findings from the survey will be available to all ULRs in early spring 2010.

The survey should take no more than 15 minutes to complete and is fully supported by your trade union. **Everything you say will remain confidential.** If for some reason you are no longer active as a ULR we would also like to hear about your experiences. You can do this by completing the short survey on the reverse of this letter.

Therefore we would be most grateful if you could return the completed survey as soon as possible using the freepost envelope provided by 4th January 2010 at the latest. If you have already returned the survey or completed it online, please disregard this letter.

If you have any questions about this survey then please contact Ann Joss at unionlearn, tel. 020 7079 6945, ajoss@tuc.org.uk

Thank you very much for your help.

Yours sincerely

Tom Wilson

Director, unionlearn

UNION LEARNING REPRESENTATIVES' SURVEY 2009

unionle

Managers' Survey



1. In what capacity are you involved in training where you work? (please tick the appropriate box)

Line/Department manager Training/Development manager Human Resource manager

Other (please specify): _____

2. How would you characterise the relationship between management and trade unions where you work?

Very positive Quite positive Neutral Quite negative Very negative

3. At the site(s) at which you are a manager: (please tick the appropriate box)

	Yes	No
Are the arrangements for ULRs set out in a formal learning agreement?	<input type="checkbox"/>	<input type="checkbox"/>
Is there a formal learning partnership involving you, the union and local providers?	<input type="checkbox"/>	<input type="checkbox"/>
Is there a union learning centre?	<input type="checkbox"/>	<input type="checkbox"/>
Is there a working group involving the employer and the union to discuss union learning?	<input type="checkbox"/>	<input type="checkbox"/>
Do you use the Train to Gain brokerage service?	<input type="checkbox"/>	<input type="checkbox"/>
If so, is the ULR(s) involved in the process?	<input type="checkbox"/>	<input type="checkbox"/>
Has your organisation signed the 'Skills Pledge'?	<input type="checkbox"/>	<input type="checkbox"/>

4. Are Union Learning Representatives (ULRs) at the site(s) at which you are a manager provided with:

	Yes
Reasonable time-off to conduct ULR activities?	<input type="checkbox"/>
Reasonable time-off to undergo relevant ULR training?	<input type="checkbox"/>
Reasonable time-off to discuss individual learning needs with their members?	<input type="checkbox"/>
Reasonable time-off to arrange learning or training for their members?	<input type="checkbox"/>
Cover for their regular job while they you are conducting their ULR role?	<input type="checkbox"/>
Reduced workload to enable them to conduct their ULR role?	<input type="checkbox"/>
Use of telephone and e-mail?	<input type="checkbox"/>
Access to office space and computer facilities?	<input type="checkbox"/>

5. Approximately what proportion of your employees has been given paid time-off from normal work duties to undertake training during the past 12 months? (please tick one box only)

100% 80-99% 60-79% 40-59% 20-39% 1-19% 0% Don't know

6. On average, how many training days did employees at the site(s) at which you are a manager undertake during the past 12 months? (please tick one box only)

10 days or more 5-9 days 2-5 days 1 day No time Don't know

7. As a result of ULR activity in the site(s) that you cover, has the number of colleagues involved in...

	Increased a lot	Increased a little	Stayed the same	Decreased a little	Decreased a lot
Training leading to nationally recognised vocational or academic qualifications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Apprenticeships	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Job-related training not leading to formal qualifications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Training in basic literacy and numeracy skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Continuing Professional Development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personal interest/leisure courses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8. To what extent do you agree or disagree with the following statements regarding the impact of ULR activity in your organisation? (please tick the appropriate box)

	<i>Agree strongly</i>	<i>Agree</i>	<i>Unsure</i>	<i>Disagree</i>	<i>Disagree strongly</i>
It has helped to close existing skills gaps	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
It has contributed to improved staff retention	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
It has had little or no impact	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
It has led to improved organisational performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
It has increased staff morale	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
It has helped to improve union-management relations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
It has raised levels of basic skills amongst employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
It gets in the way of normal production and service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
It has increased demand for training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

9. To what extent do you agree or disagree with the following statements regarding the attitude of you and other managers to ULRs in your organisation? (please tick the appropriate box)

	<i>Agree strongly</i>	<i>Agree</i>	<i>Unsure</i>	<i>Disagree</i>	<i>Disagree strongly</i>
ULRs get adequate support from management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I value the contribution made by ULRs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Management in my organisation value ULR activity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10. What element of ULR activity do you value most?

--

11. To what extent do you agree or disagree with the following statements regarding potential barriers to successful ULR activity. ULR activity in my organisation is limited because:

	<i>Agree strongly</i>	<i>Agree</i>	<i>Unsure</i>	<i>Disagree</i>	<i>Disagree strongly</i>
Most employees do not need further training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The employer already provides sufficient training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ULRs lack the necessary skills to have an impact	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our employees are not interested in additional training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ULRs do not share the same training agenda as managers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12. Has any of the following occurred at the site(s) at which you are a manager, wholly or mainly as a result of the current economic recession?

- Employment reductions or lay-offs
 Short-time working
 Wage freeze or reduction
 Non renewal of fixed-term contracts

13. To what extent do you agree or disagree with the following statements regarding the impact of the recession on union supported learning at the site(s) at which you are a manager? (please tick the appropriate box)

	<i>Agree strongly</i>	<i>Agree</i>	<i>Unsure</i>	<i>Disagree</i>	<i>Disagree strongly</i>
There is a greater focus on job related training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There is reduced demand for learning from employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am less supportive of ULR activity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Senior management is less committed to union learning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Spending on training has been cut due to the recession	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There is less time for ULR activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Thank you for completing this survey.

2nd February 2010

Dear Sir/Madam

Survey of Skills, Training and Union Learning Representatives

The University of Central Lancashire is conducting a survey of managers' opinions and experiences of working with union learning representatives. We would be very grateful if you could spare the time to complete this survey - it is an opportunity to have your say about the union learning representative initiative. We understand union learning representatives operate in your workplace and we would therefore value your views on their activities.

The survey is funded by unionlearn and the findings from this survey will add to unionlearn's 2009 national survey of union learning representatives.

I would like to assure you that your responses will remain fully anonymous and confidential. Only myself and my team of researchers here at the university will see the completed surveys. When the results have been analysed, we will send you a full summary of the findings in Summer 2010.

The survey should not take longer than 10 minutes to complete. Please complete the survey as fully as you can. I would be most grateful if you could return the completed questionnaire within the next two weeks. If you are unable to complete the survey in this time, we would still very much like to receive a completed survey from you at your earliest convenience. A Freepost envelope is provided for your reply.

If you would prefer to complete the survey online, please e-mail me at ahollinrake@uclan.ac.uk and I will send you a link where you can access, complete and return the survey to us.

If you need any help or want to know more about the survey, please feel free to contact me.

Many thanks in advance for your help and co-operation.

Yours sincerely

Alison Hollinrake

Senior Lecturer in Employee Development

Tel: 01772 894781

Email: ahollinrake@uclan.ac.uk

E-Mail Version

Dear

Survey of Skills, Training and Union Learning Representatives

The University of Central Lancashire is conducting a survey of managers' opinions and experiences of working with union learning representatives. The survey can be accessed, completed and returned online by clicking on the following link

We would be very grateful if you could spare the time to complete this survey - it is an opportunity to have your say about the union learning representative initiative. We understand union learning representatives operate in your workplace and we would therefore value your views on their activities.

The survey is funded by unionlearn and the findings from this survey will add to unionlearn's 2009/10 national survey of union learning representatives.

I would like to assure you that your responses will remain fully anonymous and confidential. Only myself and my team of researchers here at the university will see the completed surveys. When the results have been analysed, we will send you a full summary of the findings in Summer 2010.

The survey should not take longer than 10 minutes to complete. Please complete the survey as fully as you can. I would be most grateful if you could complete the survey within the next two weeks. If you are unable to complete the survey in this time, we would still very much like to receive a completed survey from you at your earliest convenience.

If you need any help or want to know more about the survey, please feel free to contact me.

Many thanks in advance for your help and co-operation.

Yours sincerely

Alison Hollinrake

Senior Lecturer in Employee Development

Appendix 12: Details of union membership at S1 and S2

Union Membership at S1 and S2

Union	Time 1 %	Time 2 %
AMICUS*	18	10
BFAWU	3	4
CWU	2	5
GMB	12	11
PCS	10	21
POA	1	0.4
RCN	1	1
TGWU	15	17
UCATT	1	1
UNISON	23	20
USDAW	11	9
OTHERS**	3	0.6
TOTAL	100%	100%
	N= 583	N =239

* Amicus and TGWU have now merged

**Unions representing less than 1% of the sample

Appendix 13: Findings

Findings from the North-West region of England

Introduction

This appendix contains the qualitative findings from the North-West region of England. The qualitative data was gathered from open questions on ULRS1, ULRS2 and the 2009 survey. The majority of this data was gathered at focus group events, and other events attended by the researcher. The qualitative data has been used to help explain and interpret the findings from the quantitative data. This utility of data, collected via mixed methods, is representative of a realist research philosophy (Robson, 2011).

The data in this appendix is presented in the same order as the findings presented in Chapter Seven of the thesis. That order is as follows; each of the union learning representative tasks from the TUC 2004 role descriptor are addressed in turn see (Chapter Seven, table 3). Analysis of the qualitative findings revealed that the union learning representative experience is affected by issues related to six categories. These were found to be: government, employer, unionlearn/union, members, the scope of the union learning representative role, co-operation between PSHs, and 'other' for relevant issues that did not fit into the above categories. On occasion there was no relevant data for one or more of the six categories. In this case those categories have been omitted from the report on the activity.

Data is referenced to the relevant survey, event where it was collected. The focus group events were as per the schedule presented in Chapter Six, these are coded as detailed below:

Focus group events

Focus Group	Union	Location
FG01	PCS	Liverpool
FG02	PCS	Preston
FG03	GPMU	Daresbury
FG04	Unison	Manchester

FG05a*	Unison	Birkenhead
FG06	BFAWU	Bolton
FG07	UCATT	Liverpool
FG05b*	Unison	Birkenhead
FG08	GMB	Warrington
FG09	Amicus	Manchester

The reference for 'other events' is detailed by event and date.

Attendance at and involvement in other events

Date	Event	Locations
12 th November 2003	Unionlearn with the North-West TUC staff meeting	Manchester
16 th January 2004	North-West TUC Learning and Organising Conference	Liverpool
25-26 March 2004	Trade Unions and Lifelong Learning Conference	Carlisle
24-26 April 2004	ISTC union learning representative Conference	Blackpool
27 th November 2004	Workplace Learning Who controls the agenda? A conference for Union Learning Representatives (CWU, T&G, Amicus, Unifi, USDAW)	London
June 2004	Unionlearn Launch Event	London
2005 to date Steering Group Member	Unionlearn with the North-West TUC Steering Group Meetings	Liverpool

4 th March 2008	The Skills Pledge	Manchester
27 th November 2008	Illuminating Learning: a celebration for unions across the North West	Blackpool
2007, 2008, 2009, 2010	Unionlearn Annual Conference	London
	Unionlearn Research Seminars	
2012 to date Steering Group Member	UCU ULF Project and steering group meetings	Liverpool

Attendance at and involvement in the above events enabled the author to develop her knowledge and understanding of how the union learning representative initiative was working in the North West and other regions, and within different unions.

1. *Raising Employees' Awareness of Benefits of Learning*

(Promoting the value of learning or training (Acas, 2003))

Government

Union learning representatives and other representatives from affiliate unions at focus group events, other union learning representative conferences and lifelong learning events stated that they felt one impact of their activity was raising awareness of the government's lifelong learning agenda. (FG01, Trade Unions and Lifelong Learning Conference, Spring 2004.) It was commented that the thing about this agenda is that 'everything takes time', and interested parties 'have to keep chipping away at it.

Employer

Union learning representatives reported that many members are willing to learn but, one said, employers are 'opposed to anything that takes them off site'. This was echoed by other representatives who felt there was a lack of support from management. It was felt that managers 'talk the talk' but do not always want to give U the resources required to do

the job. Often senior management were interested in the activity, union learning representatives felt, but middle and junior management were less interested. There was also evidence that the employer was often perceived to be working against the initiative. In a discussion about barriers to union learning representative activity within the workplace, it was felt that there was a lack of understanding from management about what was expected from them to facilitate union learning representative activity (FG03).

Unionlearn/union

There was no evidence provided through the qualitative data collection process about how this principal stakeholder (PSH) related to this particular union learning representative activity.

Members

A national officer of an affiliate union stressed the importance of union learning representatives, in a 'hi-tech' engineering sector, actively encouraging colleagues to get into learning in an attempt to address skills' shortages (Amicus union learning representative event). A cautious note was sounded when it was reported that it is 'all well and good' raising awareness of learning but then people need time to learn (FG03). It was also identified that sometimes there are problems with getting members to believe in themselves enough to see they are worthy of training and education [learning] (FG06; FG07; FG09).

Scope of union learning representative role

When asked why they had put themselves forward to become a union learning representative one reason given was the opportunity to get others and themselves involved in learning (FG03). In respect of this key activity, union learning representatives and full-time officers (FTOs) stated that it is difficult to know how much individuals understand about the union learning representative role prior to their nomination for election. Thus there was a need for awareness raising and pre-election education, to raise potential union learning representatives' awareness of the benefits of learning. Union learning representatives suggest there is a small window of opportunity to win the confidence of colleagues regarding the value of the union learning representative role. If elected but untrained union learning representatives are unclear about their role, then colleagues may,

and sometimes do, lack confidence in them. Newly elected union learning representatives need to be able to offer 'small' IAG whilst training for their full role. It was felt that pre-training information for elected union learning representatives would be helpful to enable them to understand that they will be expected to be able to give information, advice and guidance in this way.

It was also suggested that union learning representatives would benefit from marketing and sales skills, because, in order to raise employees' awareness of the benefits of learning, the union learning representative role also becomes concerned with 'selling the idea' (FG02). Raising employee awareness of the union learning representative role and activity was seen to be crucial before union learning representatives and other union representatives can start to raise employees' awareness of other (union) issues (FG04). This was seen by a number of union learning representatives as another service the union provides to members.

It was identified that different modes of activity suited different workplace settings. A full-time officer (FTO) reported the importance of union learning representatives running open days where employees can come and talk, and have their awareness raised. Whereas for construction, peripatetic union learning representatives, visiting small sites to encourage members, were considered to be more effective for that setting.

Co-operation between PSHs

An example was reported where it had at first been confusing for the union learning representative(s) in a workplace trying to work within the differing demands of the Campaign for Learning (a government initiative), the GMB (union) and TUC Learning Services (TUC/Unionlearn) (FG09).

2. Providing Learning Advice and Guidance to Employees

(Providing information and advice about learning and training matters (Acas, 2003))

Government

Respondents report a lack of provision of transparent and easy to access, accurate information on funding and the availability of adult learning opportunities, facilitated by external providers either off-site or in-house.

Unionlearn/union

There is a need to consider the early career training and support union learning representatives require. The ratio of members to union learning representatives tends to be higher than for other lay officer roles. This is because typically there are not as many union learning representatives in a workplace as there are shop stewards and health and safety representatives. More than half of union learning representatives (57%) represented 100+ union members, and this remained static across ULRS1 and ULRS2. Of the union learning representatives who responded, 14% represented 1-20 members and 12% represented 21-40 members. Also the newness of the role meant that there was not a body of experienced active or inactive union learning representatives within the organisation who could offer IAG and the benefit of their experience to the new union learning representative, as there might be with more traditional lay officer roles. A report from the union learning representative conference, spring 2004, stated that if the union wanted the union learning representatives to do the job then the union needs to provide the information for union learning representatives. Information on funding opportunities, for example, was reported to be a quagmire. Union learning representatives felt their ability to offer advice and guidance, backed up by relevant, up-to-date information, could encourage recruitment. There were specific issues discussed that were pertinent to the construction industry. In respect of IAG, it was reported that the union was developing a union learning representative handbook plus an online version and other IAG materials such as posters, and leaflets. The FTOs who were present also said that if the union were not able to get access to a site then they would commit to try and provide this IAG off-site. At another union learning representative event the FTO conceded that region (for their union) needed to make more use of email to share information they received with their union learning representatives to enable union learning representatives to provide informed IAG.

Members

It was reported that in some instances there was a general lack of understanding of the union learning representative role amongst their colleagues and thus a lack of understanding about the IAG they can provide. Some respondents felt that colleagues demonstrated limited interest in understanding the union learning representative role, or in enquiring about and/or taking up opportunities facilitated by union learning representative activity. Union learning representatives reported that where non-union

members used them in their union learning representative role over 50% of cases were for information, advice and guidance on training and learning opportunities and provision, and a fifth of cases for information on Skills for Life. These interactions should provide opportunities for the recruitment of new members and new learners.

Scope of the union learning representative role

Again there is an issue in respect of raising awareness amongst members as to the scope of the union learning representative role (FG01). Union learning representatives emphasised that they too need to be clear in respect of the scope of the role and what exactly they can offer to colleagues (FG01). It was reported, however, that colleagues are more comfortable talking to a union learning representative (seeking IAG from a union learning representative) than to their manager (FG02). Union learning representatives were also aware of the misuse of union learning representative support by colleagues, quoting examples where colleagues had arranged to meet with the union learning representative on the pretence of wanting IAG on learning but in reality it was:

“an excuse for a 30-minute break and to have a brew.”

(FG01)

Whilst discussing barriers to union learning representative activity, some union learning representatives reported that despite promoting the role, there was limited interest from colleagues in enquiring about or taking up opportunities. In response to these opinions it was felt that, with the right encouragement and IAG, colleagues would be interested: for example, if individuals were offered basic skills training when they had performance issues at work (FG04). Union learning representatives need IAG to work with both other branches and other union learning representatives. One barrier to union learning representative activity in respect of IAG might be, it was suggested, when colleagues ask for an explanation of basic skills and the union learning representative did not feel they had enough knowledge and understanding of the initiative/issue to give effective IAG (FG08).

Further opinion in respect of this activity from the focus groups and other union learning representative events was as follows. Union learning representatives reported that providing IAG that helped colleagues achieve opportunities for personal development was a satisfying and rewarding aspect of the role (FG01). An example of the sort of IAG for which colleagues came to union learning representatives was when jobs were under threat:

“Rapid redundancy response.”

(FG02)

At this event it was also stated that the IAG union learning representatives can give is not just about external provision but should also be about guiding people to what might already be available within the organisation. This is in line with the Acas guidance:

“Many employers have in place well established training and development programmes for their employees. Union learning representatives should liaise with their employers to ensure that their respective training activities complement one another and that the scope for duplication is minimised.”

(Acas, 2003, section 14)

From these discussions it emerged that the need for IAG was a two-way issue. As with task 1 above, union learning representatives also need IAG to be able to give accurate and relevant IAG to colleagues. Also at this event, newly trained union learning representatives reported that they had requested a college representative for four hours per week to give IAG to colleagues until the union learning representatives got up to speed. Their experience was that it had not been possible to facilitate this. When considering their hopes for the union learning representative role in the future attendees at this meeting stated that informed, trained and committed union learning representatives were crucial to develop and sustain the role (FG03). In respect of union learning representatives’ training, union learning representatives discussed the impact on them of receiving IAG on their initial training programme. They stated they had been given lots of information but they were confused about how it all fitted together. Information given was the ‘what’ but they were not given the ‘how’ and ‘why’ to make sense of it. These union learning representatives acknowledged that this was a useful insight for them about how they should communicate information when giving IAG to colleagues as part of their union learning representative role.

Co-operation between PSHs

As with task 1 above, the mode of provision of IAG needs to be the ‘best fit’ for the members’ working environment. In response to this, some comments from the floor were of the opinion that, as regards the learning agenda, the TUC had taken the easy steps first.

The analogy of a patient/doctor relationship was given where the union/TUC had given the union learning representatives a prescription to use on site. It was stated however that obstacles in the industry (construction) prevents people from coming forward to be a union learning representative and it was vital that union learning representatives and colleagues know what is available and how to access it – what, how and when (FG07).

3. Working (with Employers) to Identify Learning Needs [author's brackets]

(Analysing learning or training needs (Acas, 2003))

Employer

Evidence of union learning representatives' experience of learning needs' analysis and some of the issues related to this activity were raised at focus group events. Unionlearn are very specific in the wording of the task they expect union learning representatives to fulfil: "Working with employers to identify learning needs". This suggests that the employers will have bought into facilitating the learning agenda within the organisation. Attendees at focus groups and events presented a range of issues that had been experienced in working with the employer. Some of these refer to the identification of learning needs but some are concerned with the union learning representative initiative in general. The examples related to a number of key themes regarding the employers' attitude to the union learning representative initiative. Namely:

Employers' understanding of aim and objectives of the union learning representative initiative.

Ambiguity of the scope of the union learning representatives' role in the organisation.

Employer compliance with the statutory rights for union learning representatives.

The level of consistency in the approach to facilitating union learning representative activity adopted by individual managers up, down and across the organisational structure.

union learning representatives' relationship with the Learning and Development (L&D) function within organisations.

Whilst discussing the impact of the legislation (April 2003), it was reported that companies 'paid it lip service' and some felt that employers were not aware of union learning representatives' statutory rights. Middle managers were reported as "not aware of it" and "don't want to be aware of it". Senior managers were thought to be aware but not communicating this down the organisation(s) (FG06, FG09). At a number of events attendees reported that working with employers was difficult. It was stated that they got different responses from different sites within the same company. It was reported that there was an apparent lack of communication both within and across agencies (public sector) from senior management through to middle management through to junior management resulting in a seemingly random interpretation of the statutory rights and the appropriation of facility time within the workplace. Again at a further event it was stated that the management attitude towards learning was not consistent. A new union learning representative reported that her direct line manager did not, in her words: 'believe' Acas and the statutory rights for union learning representatives. Consequently she had recently been told to complete her training in her own time, thus she had attended her initial union learning representative training on her days off (Spring 2004 union learning representatives conference, FG02, FG07, FG08).

union learning representatives said that they were demotivated when there is no mandate for union learning representative activity from management. It was stated that local management wanted to tie everything down rather than agreeing the key principles for the learning agenda and then letting it evolve (FG08). In one organisation something of a vicious cycle appeared to be emerging as it was stated that union learning representative activity had not been pushed as yet with management. At this stage they did not know what was needed in the workplace as the TNA/DNA had not been completed. The findings from the TNA/DNA were required to push the completion of the learning agreement.

Other barriers to union learning representative activity in respect of TNA/DNA were examples where there was no facility for union learning representatives to conduct a private conversation with a colleague (FG06). union learning representatives discussed that to do the TNA they needed access to private accommodation for private and confidential conversations. A union learning representative from a local authority, working with 'Open Spaces' employees, reported that a portakabin had been identified but the resources required to make it fit for purpose would not be made available until the learning agreement was signed. Management were happy to say they could not progress issues

because there was only one union interested. This forum (FG06) encouraged the union to take a Joint Negotiating Committee (JNC) approach. It was also stated that management were looking for a mandate from the personnel department. As this was a local authority, a suggestion from the floor was to get the elected members on board to push the agenda with management. It was noted that if a Labour council would not support the agenda in election year then what chance of support would there be after this, especially if the ruling party changed (FG08).

Delegates felt that there was a lack of knowledge and understanding within the agencies about the link of union learning representative to the Personnel and Development (P&D) function. Again it was felt that the P&D practitioners could feel threatened by union learning representative activity. At another question and answer session, delegates reported facing difficulties with their own training and development departments. The union learning representatives felt that training and development practitioners were being precious about the facilitation of learning, training and development activity within the organisation. A response from the FTOs and senior reps was that, where feasible, union learning representatives should seek involvement in continual improvement programmes so that they are aware of, and have knowledge and understanding of, what is required and/or on offer within their own organisation (November 2004 union learning representative conference; FG02; union learning representative event September 2005). This further supports the caveat given by Acas: 2003, section 14 (discussed above) that union learning representatives should liaise with their employers to ensure activities complement each other rather than duplicate effort.

Unionlearn/union

A further issue reported was difficulty in negotiating time off for colleagues to complete the TNA/DNA questionnaire. Again union learning representatives reported the need for the education of employers, line managers, supervisors and any other party that controls employee activity in the workplace, by the TUC and their union, about the rationale for union learning representatives in the workplace and the terms and conditions for the role.

Members

An issue some union learning representatives had identified with the TNA/DNA process was how to encourage colleagues to go through a basic skills assessment. union learning

representatives reported that people “don’t want to appear to be stupid”. As basic duties in occupation roles change, for example, home carers having to fill in forms and produce reports on service users, there is a need to encourage people and spread the word and for colleagues not to be put off because of the terms of reference used (FG05).

Scope of union learning representative role

It was reported that, even though union learning representative training had provided a generic proforma for a TNA survey that could be applied on return to the workplace, new union learning representatives often felt overwhelmed by the TNA process and unprepared to put this into practice when they returned to work.

Co-operation between PSHs

Some contributors thought that there was not enough canvassing or pressure from the TUC to demonstrate the benefits to employers. As referred to against task 1, union learning representatives suggest there is a small window of opportunity to win the confidence of colleagues as regards the value of the union learning representative role. In a discussion about the impact of union learning representative activity it was reported that union learning representative activity raises expectations that cannot always be met if management is not supportive and this has an impact on members’ willingness to be involved in future initiatives (TUs and Lifelong Learning Conference 2004). This again suggests the necessity for co-operation amongst PSHs to facilitate relevant union learning representative activity in the workplace.

There was experience of apparent employer paranoia about time and money for union learning representative and related activity. Some employers present a view to union learning representatives that if they (the employer) are not in charge of the initiative then it is no good. The union reporting this had offered working in partnership to the employer but were still awaiting a response to this. From their experience of practising union learning representative activity, it was reported that there was a need for open and transparent communication about union learning representative activity with management via the personnel, training and development departments (FG03).

An overall view was expressed that union learning representatives were a positive addition to the union structure and for employers but that this resource was not utilised to its best

extent. TUC Learning Services suggested that Investors in People could be used as a vehicle to encourage employers to take the union learning representative role and activity seriously. A union learning representative employed by a major North-West region of England employer had their role recognised in the SEMTA (sector skills council for science, engineering and manufacturing) agreement/agenda, in line with a pilot project for Personal Development Agreements (PDAs). Resources to support activity were provided, for example, laptops were provided for union learning representatives to fulfil TNA activity with colleagues. This is an example of national initiatives working together to support the learning agenda from both sides of the employment relationship (union learning representative event September 2005).

4. *Securing Equal Opportunities in Training*

Government

Evidence relating to the role of the government was provided by union learning representatives expressing the opinion that government should use its buying power to ensure training providers, such as FE (further education) colleges and some HE (higher education) institutions, are more flexible in their provision, and that in turn would meet the needs of some members such as shift workers and transient workers, for example, in the construction industry (union learning representative Conference, FG07). The idea that national initiatives should support one another was raised in respect of equal opportunities, where major contractors could require suppliers to comply with the learning agenda as with other standards, such as IIP, ISO9000 and so on. Placating the employers was seen as a major hurdle, although it was claimed that three major contractors were already signed up to this (FG07).

Employers

The issues raised by union learning representatives in respect of their ability to secure equal opportunities in training are heavily influenced by the attitude of their employer and the nature of the employment relationship within the workplace (FG02). An example of this was where a company representative was negotiating with providers for NVQs. This was felt to be hijacking union learning representative activity as the company representative only told the union learning representatives what he wanted them to know, thus impeding the union learning representatives' ability to ensure equal opportunities in

learning opportunities for their members (FG03). The previous example of a union learning representative completing her training in her own time occurred in an organisation where other union learning representatives present at the event had been given paid release to attend their union learning representative training (FG08). The allocation of paid time for colleagues to attend training was an equal opportunities concern for union learning representatives. The presence of a learning agreement was seen as a positive support in securing equal opportunities in learning as it was felt that the employer's obligations need to be spelt out in black and white within the learning agreement. Facilitating this was seen as an equal responsibility of the employer and the union (FG04, FG06). There was some scepticism however where, to date, there was evidence of employers' non-compliance with the Construction Skills Certificate Scheme (CSCS) or TUPE (Transfer of Undertakings (Protection of Employment) agreements as regards terms and conditions of employment. CSCS was set up to help the construction industry improve quality and reduce accidents. CSCS cards are increasingly demanded as proof of occupational competence by contractors, public and private clients and others (citb, (construction industry training board) 2011). The formal line is that most construction sites are now CSCS-card-only sites, which means, in order to work in construction, individuals need to pass a CSCS health and safety test and demonstrate their competence.

"No CSCS Card, No job is now the norm on over 80% of sites."

(<http://www.citb.co.uk/cards-testing/#>,

(accessed November 2011)

The view held was that there would be similar non-compliance with learning agreements (FG07). A further dual responsibility was for the employer and the union to 'sing from the same hymn sheet' when communicating with members and promoting the union learning representative role and when presenting the services union learning representatives can offer to members, and non-union member colleagues (FG04, FG05). Business peaks and troughs were also identified as having an impact on equal opportunities to attend training as management was often not keen to release people in peak times. A sentiment expressed was that:

"management talk the talk but don't want to give you anything."

(FG09)

Unionlearn/union

Comments as to what was regarded as joint responsibilities for employers and unions have been presented in the previous paragraph. A key facilitator to secure equal opportunities in training is the negotiation and implementation of a joint union/employer learning agreement. At ULRS1, 59.7% of respondents reported that there was a learning agreement at their workplace. This had increased slightly to 62.7% at ULRS2 and stood at 55.9% for the North-West region of England union learning representatives in the 2009 survey. In 2009, 51.9% of respondents reported the existence of a formal learning partnership. This survey followed the introduction of the Skills Pledge (a recommendation from the Leitch Report, 2006) and 52.7% in 2009 reported that their employer had signed the Skills Pledge. The Skills Pledge committed employers to the provision of the opportunity of working towards a level 2 qualification for all employees.

Members

The main occupational groups discriminated against in respect of equal opportunities to participate in learning opportunities were, according to union learning representatives, shift workers and transient workers, for example in the construction industry. For shift workers there was a lack of flexibility of provision to match shift patterns. Also in respect of using the on-site learning centre, where the shift pattern had recently changed to four on, four off twelve-hour shifts, members were reluctant to go into the learning centre before or after their shift. Where there is shift working there also tends to be a lack of access to a union learning representative, with night shifts being the hardest to cover (FG03, FG06). For transient workforces, travel time to and from sites, long hours, overtime, half-hour dinner breaks, and the fact that basic facilities on sites are very variable all conspired to make it difficult to offer equality of opportunities to all colleagues (FG07). It was highlighted that in some organisations staff colleagues had more opportunities than craft colleagues. Also the logistics for securing offline time for colleagues in contact centres (often in government agencies) to attend training were reported to be difficult to achieve (FG02).

Colleagues' current IT ability was seen as an issue in respect of equal opportunities. The digital divide, the 'capable' and 'currently incapable' reality of individuals' current level of IT proficiency and thus their ability to access information and/or training online, was identified as something that prevents equality of opportunity to access learning (FG07).

There were some examples of positive achievements: union learning representatives at a meeting from a local authority, where some members of the workforce had not been given the opportunities that town hall employees were given, had turned this around. An example was given where the union learning representative had requested the same five days training per year initiative for support staff as teachers had received as part of their pay deal. Also another union learning representative had secured training opportunities for members where previously learning opportunities had only been available to first line managers and senior managers (FG09).

Other

It was felt that union learning representatives were crucial in encouraging colleagues to come forward, thus providing evidence that the union learning representative role, in such situations, might facilitate more equal opportunities in learning for colleagues (FG06, FG07). The importance of the location of learning centres was discussed. It was stated that, for example, if it is placed in the middle of the shop floor this can discourage learners from attending, as it is visible to anyone passing. The location of the learning centre was also an issue that affected the ability to offer learning centre facilities to the workforce due to security requirements for access (FG03). The lack of a venue for the union learning representative to be able to talk to colleagues also impacts on the equality of opportunities for some colleagues.

5. *Negotiating Learning Agreements with Employers, including Time Off for Study.*

Employer

Attendees at data collection events acknowledged that the existence of an employer/union learning agreement was crucial for clarity of procedures and that it acknowledges the role of the union learning representative. Further learning agreements were seen by union learning representatives as a vehicle that could be used to educate employers, line managers, supervisors as to the rationale for union learning representatives in the workplace and the terms and conditions afforded to the role. Attendees also reported that there was a need for the standardisation of agreements, policies and procedures to guide the process (FG01), because sometimes:

“management don’t give support towards anything to do with learning”.

(FG02)

Attendees felt this was ironic as the learning agenda was a government initiative and in this instance the employer was the government, and operating under a Labour administration at this time.

A union learning representative from a local authority commented that his union had established a workplace committee to discuss learning issues but to be effective this committee needed to merge with the other unions on site. It was felt that management would welcome the opportunity to work with all the unions represented in the organisation through one committee, in order to progress the learning agreement and on-going learning agenda activity. He went on to say that there was a need for structures to be in place, via a learning agreement that would provide guidelines for practice rather than stringent regulations (FG05). Some of the barriers to the negotiation of the agreement reported were that there was limited union representative recognition of facility time, so for union learning representatives this was felt to be even more reduced. In addition, a workplace learning forum was in place. This was attended by a personnel officer but there was no management representation on the forum (FG08).

Evidence was given of barriers that would affect a union learning representative's ability to negotiate with management. An example of this was, when asked what barriers they experienced in the workplace, attendees reported:

"Lack of support from management."

"Talk the talk but don't want to give you anything."

"Senior management really interested, lower echelons, for example, the shift manager, less interested."

"Need to get the Steering Group to attend a (union learning representative training) course together."

(FG09)

Unionlearn/union

In the 2009 survey respondents were asked, in their role as union learning representative, how often they had normally:

“‘negotiated’ with managers over learning and training and/or ‘consulted’ with management over learning and training.”

This differentiation is significant as some affiliate unions were reluctant to have union learning representatives ‘negotiating’ with management as this was seen to be the role of the negotiator representatives and they did not want union learning representatives ‘queering the pitch’ on any negotiations concerned with traditional terms and conditions of employment. For example, it was reported that there was some resistance from the union to negotiate for training opportunities whilst negotiations over redundancies were taking place (FG02). In response to ULRS2, 66.8% of the North-West region of England respondents reported that they ‘negotiate’ with their managers over learning and training whilst over three quarters (77.4%) report that they ‘consult’ with their managers over learning and training.

It was reported from one branch that a learning agreement had been drawn up but had not been presented to the employer at this stage as it was the training and development manager who was being ‘stubborn’ regarding the learning agenda. It was felt that branches need to get behind union learning representatives in such situations. This suggests that union learning representatives might not believe they have the skills to negotiate learning agreements with employers including time off for study, nor are branches necessarily embracing the learning agenda and including it in their negotiation schedules. A further comment at this event, supported by the group, was that within the union learning representative training course there was a ‘lack of trade unionism’, a lack of a union perspective. The TUC Learning Services representative attending the event commented that the TUC’s generic union learning representative training course was being rewritten to include union values (FG04). Given that a key enabler to the activity is the support of management, it is crucial that the learning agenda is on a branch’s negotiating agenda and that union learning representatives have the confidence in their own knowledge and skills to influence activity in the workplace. Attendees at one event felt that the agreement issue had to be addressed with some urgency as the lack of an agreement was seen as a possible threat to the union learning representative role (FG08).

Scope of union learning representative role

Union learning representatives stated that on return to the workplace following their initial union learning representative training they were 'okay' talking to members but did not feel prepared to talk to employers and/or providers. Their future hopes for the union learning representative role was to get to a position where union learning representatives had enough knowledge and understanding to manage the role and activity in the workplace themselves. As the regional officers reported, knowledge, understanding and confidence in role enables union learning representatives to be more influential (FG06).

Opinion at another event was that there is limited opportunity for an individual union learning representative to be able to negotiate learning agreements with employers including time off for study. The evidence presented to support this position is, as stated previously, that it is a battle in this particular industry for union officers to be able to get employers to adhere to the provision of standard terms and conditions and it was felt the same would apply to this agenda (FG07).

An attendee from a public sector organisation reported that they always had to negotiate time off for union learning representative activity and provide evidence of where they were going, what they were involved in. Once again line managers were seen as the problem, not senior management. Hence negotiation skills are seen to be important for union learning representatives. Another barrier to union learning representative activity reported was that problems exist with new union learning representatives who do not have a union role background. Thus the learning agenda should be on a branch's negotiating agenda to formalise the role within the branch. This would support union learning representatives and help develop their confidence in their own knowledge, and their understanding and skills to influence activity in the workplace.

Co-operation between PSHs

In a North-West region of England local authority, the employer will only negotiate joint agreements, and had responded that they were unable to progress issues as only one union had expressed interest in a learning agreement (FG08). The unions originally presented the TUC model agreement but management turned this down. It was reported that management wanted to tie everything down rather than agreeing key principles and then letting the practice evolve. It was reported that it was a political thing to control terms and

conditions within the organisation year on year. At a further event, it was acknowledged that there is a need for all members of the employment relationship to honour the spirit of the agreement and that this depends on the relationship with managers on the ground between organising shop stewards, union learning representatives and colleagues (Amicus union learning representative event). Again this highlights that the support of management is crucial.

6. *Helping Employers to Establish Employee Development Schemes*

(Arranging learning or training (Acas, 2003))

Employer

“At this present time the management have a ‘Learning Bus’ (from the local FE college) on-site, for management employees only. Don’t know if this is an attempt to disrupt the workforce but I feel members are losing interest when management will not consider giving us (my emphasis) office space for a learning centre.”

“I am very ineffectual; I came back from my course with such hopes and ideas. All shot down by my department training officer, who I am supposed to work with.”

“union learning representative scheme is being run in a top-down way with little or no resources, e.g. a two-hour facility time, shared between 15 or so union learning representatives per week, no access to an office or other resources, e.g. 15 or so union learning representatives sharing one workstation. [...] distrust of the corporate side of things. Responsibility should be devolved to lay union learning representatives not referred to union learning representative co-ordinator who is a corporate appointee [ment]”

“Frustrating delays and stop/start developments when negotiating with the employer, e.g. three years to settle a learning agreement.”

“Can’t get (employer) to agree to us linking with ‘Arriva’ trains at the local railway station, which could overcome issues for a small bus depot where shift patterns mean low availability of drivers at any one time. So insufficient [learners] to meet ‘minimum’ [numbers] requirements of training providers.”

(ULRS2:Q9.1)

union learning representatives identified with getting the employer on board to promote the initiative within the workplace. union learning representatives reported the need to use forward-thinking managers as champions of the union learning representative initiative. It was felt such managers were able to promote the union learning representative role across and in different organisations and provide hard evidence to demonstrate the impact of activity in contributing to addressing organisational issues such as reduced sickness absence levels, improvements in the employment relationship and any increased quality in performance. There were also examples of where it appeared that managers were behind union learning representatives (FG03, FG09).

From a negative point of view, there was evidence of how the employer was often perceived to be working against the initiative. Again it was reported that line managers were not convinced of the positive benefits that come from the union learning representative role/activity. A general comment from union learning representatives within government agencies was that there was a focus on output targets, and attendees felt this was short-sighted of the employer. Union learning representatives felt that target-driven managers present a 'no win' situation for facilitating learning activity within the workplace (FG06). An example of the employers' reluctance to facilitate colleagues' participation in relevant training events was a request for colleagues in a customer service role to be able to participate in British Sign Language (BSL) training opportunities. This is one of a number of examples where the government as the employer responded less than favourably to facilitating learning and the union learning representative role in the workplace. It was noted that the impact of agencies having to practise in line with the Disability Discrimination Act (DDA) could move this issue forward (FG01). Specific examples were given where some colleagues, employed by a public sector employer, were completing basic skills training in their own time. Thus if the employer is not willing to facilitate such fundamental training provision it is unlikely that they would look to working with union learning representatives to establish employee development schemes (FG08).

union learning representatives' experience suggests that employers' ideas were alright in theory but often different attitudes were experienced in practice. union learning representatives reported what they perceived as more positive examples where organisations were using union learning representatives for a bottom-up approach to

getting information into the organisation (FG04). At another event further evidence was given that developing a working relationship with the personnel and development function helped to cut across red tape and achieve the support of the Chief Executive Officer (CEO). Again it was reported that it was below director level where the barriers exist. union learning representatives report that it appeared that the CEO believes that, once an issue is past the directors, it happens. It was felt that this was down to issues with the leadership style within organisations. A proposed solution to this was to get the learning agenda considered in other systems and structures, for example, via the team briefing process (FG05).

As reported against an earlier category, it was stated that the employer was trying to impose limits on the number of union learning representatives. At the time of this event there was an embargo on union learning representative recruitment and the creation of learning centres within North-West region of England branches of this government agency. (FG01, FG02). In another organisation steering group activity had lapsed and concerns were raised in respect of the balance of membership of the (lapsed) steering group, in respect of the ratio of management to union learning representatives. It was also stated that union learning representatives had not received minutes and other papers from previous meetings. union learning representatives are keen to help the employer to establish employee development schemes but often are not given the opportunity (FG03). Again there were reports of the training and development manager being the biggest barrier to effective union learning representative activity. From another perspective it was discussed that for organisations to work towards achieving an appropriate skills base then organisations need to resource the HRM/HRD function appropriately. The opinion of this group was that organisations were using union learning representatives to do the job for them (FG04).

Unionlearn/union

When union learning representatives were asked how best their union could support the role and development of the union learning representative, responses included that there was a need for the union to 'hammer home the message' to employers about what the union learning representative is and the purpose of the role. Another alternative would be for other people to come in and lobby management about the union learning representative role and to explain and demonstrate what could be achieved through union learning representatives (FG02). There was an idea presented to get the steering group to

attend a course together to get the message across to members of the employment relationship (FG09). It was reported by some that the company(ies) were 'hijacking the agenda' (FG03) and that management 'think they own union learning representatives'.

The union learning representative role had recently been included in one union's rule book. It was anticipated that formalising the role in the rule book would facilitate branch support and that this would alleviate management's perception of their ownership of union learning representatives. Being perceived as management's puppet was not seen as conducive to building members' confidence in the role (union learning representative Conference; FG03). The role of a suitably knowledgeable convenor/senior rep was seen to be crucial. At FG03, it was felt that the company were playing down the opportunities to the workforce except for NVQs. The employers wanted NVQs but the employees were not clear what was driving this agenda. They questioned the impact of the learning agenda and the appropriate role for union learning representatives in the organisation. These learning and development opportunities were perceived as 'management tricks'. They felt that union learning representatives and the whole union structure within the organisation needed to raise the awareness of the workforce to overcome this scepticism.

Members

union learning representatives reported they came up against some issues when encouraging colleagues to participate in employee development opportunities outside of working hours. One example given was the proposed provision of the European Computer Driving License (ECDL) for colleagues; colleagues, however, viewed the ECDL as work and were reluctant to participate. union learning representatives said they need to be able to offer other development opportunities that people want and do not see as work related (FG02). The North-West region of England union learning representatives expressed their wish to be able to negotiate such provision with their employer. This demonstrates that union learning representatives want to be able to offer employee development schemes that meet the business need but are also more palatable to members.

Previous examples of partnership-based employee development schemes, such as those at Ford and Rover, were based on a philosophy of getting people back into learning. The same will did not appear to exist in the public sector agencies. It was reported that:

“(the)employer view is that training and education should be within our own trade, to support the retention of trained staff.”

(FG06)

Attendees reported that personal development was very much on the back burner in their agency and at this point there was no current personal development planning (PDP). Also, as reported earlier in respect of identifying learning needs, there was a view in the agencies that PDP equals going for advancement and thus it is not appropriate in all roles to ensure personal development was available (FG02).

There was evidence from one organisation of a successful basic skills programme where over 70 employees went through the programme over a twelve-month period. It was, however, also pointed out that, from the experience of those present, there are problems with the ability to meet colleagues’ further aspirations through follow-up courses. It was stated that:

“management were okay with basic skills but, as people wanted to carry on, management were not impressed, they don’t see obligation to follow up.”

“the employers’ view is that, following basic skills, if people aspire to go higher then they should do that in their own time.”

(ULRS2, Q9.1)

Scope of union learning representative role

It appears that on many occasions union learning representatives establish some level of employee development schemes despite the management. These are reported against the PSH that impacts on this aspect of union learning representative activity. Also, it is reported below, in respect of the scope of the union learning representative role and where co-operation between PSHs is either present as an enabler or absent as an inhibitor to this aspect of union learning representative activity.

An example was given describing how union learning representatives had been able to influence the content of a development programme in which a variation, used by an agency in Scotland, was a better fit for the local development need. The content of ECDL was not seen as relevant and was too long. Therefore, instead of ECDL being offered, the City and

Guilds' ITQ (pick-and-mix IT User qualification, linked to ECDL) had been offered as an alternative (FG02).

An example from a private-sector employer was discussed where a partnership approach had been taken to identifying requirements and establishing networks to provide opportunities for employees who were losing their jobs. In the summing up session of the event, union learning representatives expressed their wish to not just be tolerated by employers but to be given the opportunity to achieve results such as these (FG09).

Some union learning representatives, however, do struggle with establishing employee development schemes:

"As this is my second year as a union learning representative, I feel that I have let colleagues down as I told them that I will get things going, but I have still not passed 'GO'."

(ULRS2, Q9.1)

Co-operation between PSHs

"I have personally found problems with all the parties involved, from lack of union assistance from our full-time officer, and employer's lack of understanding and commitment to any personal development of its staff."

(ULRS2, Q9.1)

There was a report of a situation where the company appeared to be 'hijacking the agenda'. A company representative (Learning Centre (LC) Co-ordinator) was doing all the negotiation with providers for provision. The union learning representatives felt that they needed to know this information but were only being told what he wanted them to know. It was felt that the company were playing down the opportunities for the workforce except for NVQs. As an aside, it was also stated that the LC Co-ordinator was working closely with a TUC Learning Services Project Worker and union learning representatives felt there was a conflict of interest here. This appeared to be a breach of the accepted protocols for TUC Learning Services gaining access to an organisation, as this was always to be via the senior steward and/or the branch committee on site (FG03).

It was stated that in large organisations it was difficult to get employers to agree to realistic facility time and to a ratio of colleagues to union learning representatives that would facilitate meaningful employee development schemes. This experience suggested that employers' ideas were alright in theory but not practised in the same spirit, that they were, for example, 'partnerships' in name only. Union learning representatives reported examples where organisations were using union learning representatives for a bottom-up approach to getting information into the organisation. An example was given where the branch were reluctant to support employee development practice. It was stated that: "We don't want people doing flower arranging in work's time!" It was discussed that Investors in People could be used as a vehicle to encourage employers to include union learning representatives in establishing employee development schemes (FG04).

It was reported that an employer training pilot scheme with an employer had been reasonably successful. It was reported, however, that it took:

"hours and hours to convince employers and to convince members to attend the company training programme."

(FG07)

Positive examples of co-operation were given. One example was where a general manager was actively encouraging employees to participate in further education. There were reports of awareness sessions being run to inform line managers about the union learning representative role and its activity, and there was evidence that top management support along with branch support had 'encouraged' awkward line managers to co-operate. A further, positive example of the employer and the union learning representative working together was presented. During a reorganisation within a local authority the Cleansing and Grounds Work departments had been merged. An operational education plan was drawn up using risk assessment and health and safety as the vehicle. It was reported that the outcomes from this were very successful. Colleagues were asked to contribute their views and opinions and they were taken on board. It was acknowledged that colleagues had been sceptical at first as to the reasons behind the initiative. These partnerships between the employer and employees and their representatives had achieved successful delivery of services and improved community well-being. That same ethos had been put into learning and skills and had been welcomed by the management team and provision from basic IT skills to degree programmes had been achieved within four years. It was acknowledged that

self-learning was in its infancy but the evidence from the previous project anticipated it will be supported accordingly (FG09).

An example showing employers need help to establish employee development schemes came from representatives from the aerospace industry. At the time of this event, it was claimed by attendees that 'the UK aerospace industry' was ranked as second in the world but that maintaining this position required a strong knowledge base within the sector. It was stated that union learning representative commitment and buy-in was required to maintain the industry's position. The discussion went on to claim that in every sector there was a massive crisis in respect of skills' shortages and the lack of ability to replenish the knowledge base in the workplace. National officers present stated that they value the role of union learning representatives and the contribution they can give. As discussed against the previous task above, evidence was given that the role of union learning representatives was written into the SEMTA agreement. Attendees questioned how they would monitor that the positive intent expressed in the document was practised once the employers had the funding available. The SEMTA agreement was a high-level policy statement of intent and the task was to turn this into action in the workplace as targets/milestones had to be achieved to get the next stage of the funding. At this time the agreement was based upon trust on both sides of the employment relationship between a major employer and the union learning representatives and their union represented at this event. It was stated that the employer needed the union's help to try and overcome skills shortages (Amicus union learning representative event). At one organisation, where the employer had previously refused to give colleagues the opportunity to complete NVQs, the situation had shifted so that management were hoping the learning agenda would lead to NVQs. Unfortunately it was not confirmed what had led to this change of heart (FG03).

7. Establishing and Running Trade Union Learning Centres

Government

As seen elsewhere in this thesis, from the North-West region of England LSC interviews, the LSCs confirmed that trade union learning centres on employers' premises were effective but their sustainability was questionable: there was evidence from the LSCs that once external funding finished, if such centres were not underpinned by the employers, then they tended to become a resource centre rather than an active learning centre for off-the-job learning activity.

Employer

union learning representatives employed within a government agency reported that there was a lack of learning resources within some parts of the agency. This suggests limited opportunities for union learning representatives to be involved in establishing and running trade union learning centres. Also management within the agency was denying access to and/or use of computers to facilitate trade union education courses on site (FG02). Union learning representatives were happy to start small in respect of this activity: for example, a future hope for one U's role was to get at least one classroom, somewhere within the organisation (FG08).

Unionlearn/union

Some union learning representatives felt that the union should be more directive in establishing a national strategy in respect of setting up [union] learning centres to encourage consistency of opportunity for members (FG03).

Members

It was felt by some union learning representatives that to be able to meet the further aspirations of colleagues, access to a learning centre was required (FG06).

Scope of union learning representative role

When asked to identify what further development attendees might be looking for as a union learning representative, there were a number who cited 'How to run a union learning centre'. It appears, therefore, that there is a will amongst union learning representatives to be able to take on this role. In addition, attendees stated that they felt the absence of a learning centre made it difficult to establish the union learning representative role within organisations (FG03). At other events it was confirmed that evidence of the impact of union learning representative activity had been the establishment of a number of learning centres (Trade Unions and Lifelong Learning Conference). One union learning representative reported their personal achievement from union learning representative activity to date had been setting up the learning centre at their place of work. Their future hope for the union learning representative role was to see the establishment of a learning centre on every site, and union learning representatives managing the learning centre, becoming self-sufficient and supporting learners (FG06).

Co-operation between PSHs

The group also felt that organisations with union learning centres needed to support [local] organisations where it was not viable to have a learning centre (FG03).

8. *Supporting Innovative Workplace Development, such as Union Learning Fund projects*

No further evidence of this criterion was gathered at the focus groups and other union learning representative events. It appears, therefore, that this is not an opportunity for the great majority of union learning representatives; the evidence from this research suggests this task is an opportunity for just around one fifth of union learning representatives.

9. *Monitoring Quality of Provision. Progress of Colleagues, (incorporating monitoring of own union learning representative activity)*

All evidence for this activity is within the main document.

1. *How has your union learning representative Role Changed?*

i. Increased union learning representative role

Employer

Examples were given where the allocation of paid time/facility time to the union learning representative had helped them to perform their union learning representative duties. A further example was where the union learning representative role had developed into a full-time role, supporting members in an on-site learning centre. Other examples of role development were instances where the union learning representative role was being applied in support of other workplace initiatives, for example, working with the agenda for change in the public sector, developing a knowledge and skills framework, and facilitating personal development reviews.

Unionlearn/union

union learning representatives reported that their role had changed following the successful negotiation of a learning agreement and as a result of the extra planning required for the establishment of a learning centre.

Members

Some union learning representatives reported that they are working more closely with colleagues. Where the initiative had been in place supporting basic skills work, a follow-up to this was colleagues wanting more than basic skills, for example, NVQs, and training for better jobs. Union learning representatives reported a deeper involvement with colleagues, such as further progression outside of the learning centre activity. Word-of-mouth recommendations from colleagues on a course had raised interest from other colleagues. Also, in situations where there were redundancy programmes or threats to job security, members' issues had resulted in the need for more union learning representative activity.

Scope of union learning representative role

Respondents reported that in some situations their role was constantly diversifying. This had been achieved in a number of examples through a union learning representative's change in role from rep to running a learning centre. One response made reference to the union learning representative being involved in three active learning centres. There were examples of job change/enrichment; for example, a union learning representative being 'promoted to learning centre coordinator', and the evolution of a lead union learning representative role in some larger branches. Finally, at least one union learning representative was now working as a Project Worker, on behalf of their union, for TUC Learning Services North-West region of England.

Other development and changes within union learning representative role were given as:

"Now I am an organiser, signposting stewards and union learning representatives."

(ULRS2: Q4.25)

union learning representatives reported they were sourcing funding, liaising with companies/providers on training needs, brokering learning opportunities with local providers and ultimately supporting learners. As the union learning representative becomes

established, there is evidence that the role develops. An outcome of this is personal development for the union learning representative through the role. For example, some union learning representatives reported that they were now more confident in talking to people. A respondent had to develop further personal/social skills in order to present the case for skills for life at many different levels in the organisation. The development of the role of lead union learning representative provided personal development for the union learning representative. There was also an employer making use of the union learning representative to provide in-house training courses and to promote company training and performance development reviews (PDRs). Union learning representative involvement in other initiatives, such as World Book Day and other projects, widens the scope of the role. There has been increased activity in organisations where a lot of emphasis was being given to basic skills. Also as the union learning representative and/or a learning centre becomes established, the scope of courses the union learning representative could offer to colleagues widened. There was, however, a note of caution from a respondent who reported that as the role developed in these ways their experience had been:

“More paper, more mundane, less people contact, you lose sight of why you’re doing it.”

(ULRS2: Q4.25)

ii. Decreased union learning representative role

Employer

Evidence of a decrease in activity linked to this PSH ranged from reports of ‘no support’ given by management through to limited employer support that led to a union learning representative experiencing difficulty in securing time off to pursue their union learning representative role. Union learning representatives reported difficulties in setting up a learning agreement in some organisations. A lack of facility time and under resourcing for the role can result in the union learning representative doing a lot more in their own time. Respondents cited barriers to the role ‘in general’ and a reluctance by the employer to provide non-work-related training and development for members. Some union learning representatives felt there was little consideration of employees’ learning needs. In addition, there were reports of employers refusing to provide resources to support the initiative: for example, office space for a learning centre. Even where a learning centre had been

established, a situation was reported where a learning centre had worked and created the need for a full-time co-ordinator to sustain it. This was not facilitated by the employer with the result that:

“now it’s a farce: [we] have a learning centre and a lot less learners and/or resources.”

(ULRS2: Q4.26)

Whereas, in the previous section identifying where the union learning representative role had increased, other workplace initiatives and issues had provided opportunities to increase the union learning representative role such as the ‘Agenda for Change’, in some organisations by contrast time was often not available for promoting learning. It was reported that, in some organisations, the company’s employees were already well educated. A positive example of a decrease in the union learning representative role was given:

“Now I put union learning representative training into my job.”

(ULRS2 Q4.26)

Unionlearn/union

On occasion a lack of union support was reported. As identified earlier in the findings, some respondents had experienced difficulty in setting up a learning agreement. Comments were made, such as:

“the branch is not interested in improving employees’ skills.”

(ULRS2:Q4.26)

In addition, the impact of ‘internal politics’ was sometimes felt, leading to a situation where the union learning representative had been side-lined and thus was no longer an active union learning representative. Complacency, and therefore no enforcement, from the other union learning representatives on site were also given as factors. An example was given where union learning representative activity had been accepted by management but no activity was taking place due to the union learning representative having other union rep and health and safety rep commitments. The union learning representative’s other union

roles tended to take precedence on a day-to-day basis due to the nature of the case work. This raises a number of issues for consideration: the hierarchy of lay officer activity, the ratio of activists to members in a branch and thus how the branch has to be structured to comply with the union's rule book, as well as the need for adequate resources being available within a branch to facilitate the union learning representative role.

Members

union learning representatives reported that workers were often more in tune with management-dictated training because they did it in paid work time. On occasion there was a lack of member support, with difficulties in generating interest within the workforce, and a general lack of interest from members being cited. In one instance, where the union learning representative had previously been effective, it appeared that the learning activity had not been sustained as:

"People have taken all they wanted to take but it is at a standstill now."

(ULRS2:Q4.26)

Since government funding had been reduced for adult courses and the provision of free courses had stopped, colleagues did not want to self-fund and so had lost interest in the learning opportunities promoted by the union learning representative. Once again, the impact of redundancy programmes was cited, because an obvious impact of redundancies is fewer employees.

Other considerations

These tended to relate to funding issues. Where for example ULF funding had run out, the learning centre(s) were now under threat of closure.

iii. Other changes in union learning representative role

Unionlearn/union

As discussed previously, the ratio of colleagues to union learning representatives tend to be high. There tend to be fewer union learning representatives than other representatives, so it can be an isolating experience. There were reports that some union learning

representatives were not interested and not dedicated enough to make it work. This was reported to be very demotivating for committed union learning representatives.

Scope of union learning representative role

As has been referred to previously, the requirement for union learning representatives to provide reports/evidence of their activity to LSCs via unionlearn, where more statistical proof was needed by regional and national office, had also led to a change in the scope of the union learning representative role. In another example, one union learning representative reported that ultimately their union learning representative role had led to their securing a new job in education.

This concludes the presentation of the qualitative data. Key points have been summarised and presented in Chapter Seven against the relevant union learning representative activity (TUC, 2004).