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 LSC

Leading learning and skills

Working Together: nextstep and Trade Unions

February 2005

Of interest to local Learning and Skills Council,
TUC, individual trade union and nextstep
colleagues

The Learning and Skills Council and the TUC work in partnership at a strategic and operational level to develop where feasible coherent information, advice and guidance systems to meet the needs of individuals in the workplace.

This document seeks to provide guidance to **nextstep** contractors and their wider delivery networks to help them develop joint working relationships with trade unions and the TUC, so helping them to increase the benefits of information and advice to employed people in unionised workplaces and support the Government's skills agenda.

The document refers to information, advice and guidance (IAG) partnerships (IAGPs), which of course operated under previous contracting arrangements. From August 2004 IAG services were re-branded as **nextstep**.

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Local LSC, the TUC and nextstep contractors should use the content of this publication to inform the development and agreement of local memorandum of understanding.

Of interest to local Learning and Skills Council, TUC, individual trade union and **nextstep** colleagues

Summary

This document seeks to provide guidance to **nextstep** contractors and their wider delivery networks to help them develop joint working relationships with trade unions and the TUC, so helping them to increase the benefits of information and advice to employed people in unionised workplaces and support the Government's skills agenda.

The document refers to information, advice and guidance (IAG) partnerships, which operated under previous contracting arrangements. From August 2004 IAG services were re-branded as **nextstep**.

The document will be of interest to colleagues in **nextstep** delivery networks, trade unions, the TUC, the Learning and Skills Council (LSC) and local LSCs, and the Department for Education and Skills, and should be used to inform the development and agreement of objectives and key performance indicators within **nextstep** contractor business plans.



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Executive Summary

nextstep Delivery Networks and Trade Unions

nextstep networks and trade unions need to work together to support the Government's Skills Strategy. Collaboration will help to maximise the benefits of lifelong learning to clients, by enhancing **nextstep** services to employees in the workplace, and will be mutually beneficial to networks and trade unions because it will help each to achieve their delivery and participation targets.

This document is intended to support local **nextstep** networks in their planning and delivery of IA services, particularly to people in the workplace, by exploring ways in which to form links with trade unions and the TUC.

The guide sets out the policy context in which collaboration between **nextstep** networks and trade unions should be viewed. The contents show that good practice is already underway, and offers pointers that could help **nextstep** networks to understand the issues affecting trade unions and their members, and provide practical tips on how to get involved with unions and the TUC in operational and strategic ways. The document draws on a range of research carried out for the TUC and the Learning and Skills Council (LSC) between 2002 and 2004, and on information provided by local LSCs and their then information, advice and guidance (IAG) partnerships through quarterly reports on the IAG initiative, 2003–04.

Nine key features were identified in the research that can contribute to successful engagement between IA networks and trade unions.

- Link up with TUC Learning Services.
- Be proactive in contacting local unions and respond positively to their contacts.
- Understand the trade union and TUC agenda.
- Be aware of the role of and constraints on union learning representatives.
- Focus collaboration on specific activities, and be flexible and imaginative.
- Maintain a communication flow and cultivate relationships.
- Form strategic alliances with the TUC, trade unions and the LSC, and other key players.
- Establish joint working and referral protocols.
- Where appropriate, use trade unions as a deliverer of services.

This document relates to IAG activity carried out by the LSC, including the **nextstep** IA service, Union Learning Fund and Employer Training Pilots. It also has relevance to all other LSC programmes and to the wider Skills Strategy, including the LSC's strategy to deliver a nationally recognised high-quality IA service for adults as part of the National Policy Framework for Information, Advice and Guidance.



Intended recipients

The document will be of interest to colleagues in **nextstep** networks, trade unions, the TUC, the LSC and local LSCs, and the Department for Education and Skills (DfES).

Introduction

Purpose

1 This document is intended to support local **nextstep** contractors in their planning and delivery of information and advice (IA) services, particularly to people in the workplace, by exploring ways in which to form links with trade unions and the TUC.

2 **nextstep** contractors and trade unions need to work together to support the Government's Skills Strategy; collaboration will help to maximise the benefits of lifelong learning to clients, by enhancing **nextstep** services to employees in the workplace, and will be mutually beneficial to networks and trade unions because it will help each to achieve their delivery and participation targets.

Scope

3 This document relates to information, advice and guidance (IAG) activity carried out by the Learning and Skills Council (LSC), including the **nextstep** IA programme, the Union Learning Fund (ULF) and Employer Training Pilots (ETPs). It draws on a range of research carried out for the TUC and LSC between 2002 and 2004, and on information provided by local LSCs and their then IAG partnerships through quarterly reports on the IAG initiative in 2003 and 2004.

Background

4 Under sections 5.1(i) and 12.6 of the Learning and Skills Act 2000 the LSC is responsible for securing IA services for adults in relation to learning and work. Until August 2004 this responsibility was discharged through the IAG initiative, whose objectives included, from 2002, engagement by IAG partnerships with trade unions to extend and improve IAG provision to learners in the workplace. Since August 2004, the LSC has reformed the provision of IA services having tendered the management and procurement of local service delivery and introducing the national **nextstep** brand.

5 The Skills Strategy, *21st Century Skills: Realising our potential*, made several recommendations for improving IAG services and, in response, the LSC developed its vision for coherent IAG services for adults and carried out major reforms to the IAG initiative. A key element of the reformation included a tendering and contracting process for the procurement and management of the IA service for adults in local LSC areas.

6 The LSC vision for IAG aims to improve the participation and achievement of adults in learning and work by ensuring that good-quality IA on skills, training and qualifications is at the heart of everything the LSC does.

7

It developed seven key objectives for delivery of a successful IAG Strategy for Adults. Objective Two is to "develop a flexible IAG infrastructure that meets the needs of the learning and skills agenda at national and local level", and the activities designed to achieve the objective include:

- defining the role of IAG within workforce development
- ensuring the objectives of the Workforce Development Strategy, as it relates to IAG, are implemented, including work with union learning representatives, ETPs and Sector Skills Councils
- building the capacity of local IA services to support workforce development.

8

The LSC has identified six national activities to be undertaken by IA contractors and their wider delivery networks to support the seven objectives. Activity Six is "to provide a coherent service for employers and employees by raising the profile of IAG in the workplace in partnership with Business Link and other employer intermediaries".

9

The guidance to organisations tendering for the procurement and management of IA services expands on this theme. "Many existing IAG partnerships had already formed strong links with trade unions. Union learning representatives and learning advisers are doing valuable work within companies to promote lifelong learning to employees. The contractor will need to extend the relationship between their subcontractors and trade unions. The contractor, or its subcontractors, may also want to work in partnership with TUC Learning Services, a local trade union or trade union learning representatives to support applications to the ULF to enhance **nextstep** services for employees in the workplace."

10

The ULF prospectus adds another policy perspective: "Union learning representatives will be important sources of information to both members and employers about the new entitlement to free learning for adults without the foundation skills for employability (Level 2), ETPs and the new adult learning grant that will be piloted as part of the Skills Strategy. DfES, LSC, TUC and IAG partnerships will work together to ensure union learning representatives have access to information that will support this role." There is more detailed information about the ULF at Annex A.

The context

11

The reason engagement with the trade union movement is so important to the success of the IA programme and the achievement of the Skills Strategy lies in the role of trade unions and, in particular, of union learning representatives and TUC Learning Services, in bringing learning to the workplace and raising awareness, amongst employers and employees, of the link between learning and the acquisition or recognition of skills on the one hand and competitiveness, good industrial relations and employability on the other.

12

Union learning representatives have been instrumental in bringing thousands of employed people into learning since 1998 (the vast majority of them "non-traditional" learners), for negotiating formal learning agreements with employers, and for bringing learning and staff development to the top of the bargaining agenda. Furthermore, the people they are encouraging to participate in learning include significant proportions of low or unskilled individuals and of people having problems with reading, writing or numbers. These individuals form a key target group for the IA programme.

13

Union learning representatives are trained to provide a basic level of information and advice to their members considering learning, and to identify basic skills needs; however, in general, union learning representatives are not equipped or able to provide in-depth IAG or basic skills support and their role when identifying individuals with such needs is to broker and refer to appropriate provision. In order that they can fulfil this role, it is self-evident that they need access to organisations and individuals that provide these services – the IA delivery network.

14

The corollary to this is that **nextstep** networks, in delivering challenging targets relating to take-up by people yet to achieve a Level 2 qualification and in supporting the skills agenda, will need to work hard to reach a major group of clients which, historically, they have not done to any significant extent. However, in workplaces nationwide there are millions of people who fall into the target groups; this is why the LSC has said that "There is a strong need for close collaboration between [networks] and key intermediaries, including Business Links, trade unions and Sector Skills Councils".

15

The Government's national policy framework for IAG, underpinned by the LSC's strategic planning framework for coherent IAG services for adults, requires that users are entitled to expect the IAG services they access to be quality-assured through the **matrix** Standard; that frontline staff should be competent to identify users' needs and refer them to appropriate alternative practitioners or provision; that staff delivering the core IA services must be competent to do so; and comprehensive supporting, enabling and signposting information must be made available.

16

Feedback from trade union centres that have joined IA networks, and those that have achieved the **matrix** Standard, is that the quality of the service they now offer is much higher, whether directly as a result of improvements in their own delivery, or because of access to a much wider range of referral options. If the quality requirements of the national frameworks are to be met, and the front-line advice provided by learning representatives is to be backed up by ready access to further support for those who need it, then it is clear why the establishment of strong and fruitful links between IA networks and trade unions is essential.

17

There is additional background about the role of union learning representatives, the learning agenda of trade unions and the TUC's IAG initiative at Annex A. TUC and trade union contacts are listed at Annex E, and useful publications at Annex F.

18

Meanwhile, where union or IA engagement has been successful, the then IAG partnerships report overall satisfaction and, in many cases, delight, with their working relationships with unions, citing as benefits access to employed people and consequent positive impact on delivery figures (and this includes a number of instances where trade union centres have become delivery centres for the IA programme), improved quality of service to union members, where the centre concerned has achieved the **matrix** Standard, and a greater insight into the trade union agenda from other partnership members.

Working with Trade Unions

How do we do it?

19

In the IAG partnerships (as they were formerly known) where links with trade unions are positive and productive, at least one, and often more than one, of the following features is present. It is important to remember, however, that no one approach or method that is featured in this document is a guarantee of success if adopted elsewhere.

20

Trade unions are organised and operate differently from each other and, in some cases, arrangements within the same union are different from area to area. The conditions under which learning representatives operate are also radically different, according to the size of the workplace, the nature of the business, the attitude of the employer and the prevailing business conditions. Of course people are all different and this applies to learning representatives, trade union officials and TUC officers as much as to anyone else; their priorities, pressures, interests and freedom of movement, along with the other issues mentioned, are all factors that will influence the way people go about engaging with the union movement, what is achievable and the speed at which it will happen.

21

See Annex A for a detailed background note to TUC and trade union issues and activities relating to learning and IAG.

Link up with TUC Learning Services

22

TUC Learning Services have played a key role in facilitating contact between (the then) IAG partnerships and individual trade unions, and will continue to have that linking role for the foreseeable future. Learning Services are regionally organised, with officers responsible for promoting and managing trade union learning policy and activities based at the TUC's six regional offices. Each has at least one person who is responsible for promoting and developing IAG, although some have more; it may be, however, that IAG is not the only topic in their portfolio of duties, which you need to bear in mind in your dealings with them.

23

Learning Services staff have lists of IA contractors and LSC contacts in each LSC area that their region covers, and also contacts with individual trade union offices, usually education or learning staff, as well as with full-time officials. They will also be aware of most of the unionised workplaces in their area, particularly those where union learning representatives operate, and depending on local circumstances and relationships they may also be aware of when and where training courses for learning representatives are taking place, a useful awareness-raising opportunity which is covered later in this document. Of course, they will be well briefed on IAG, LSC initiatives and a range of other learning-related topics.

24

The role of the TUC IAG workers is to promote IAG to trade unions and through them to employers and union learning representatives in their areas. As part of this remit, they will seek to identify unionised workplaces for which participation in the IA network would be appropriate and encourage engagement by the union(s) involved. Typically, the catalyst for such participation has been an on-site or near-site workplace learning centre that has been established through collaboration between union and employer; unions are encouraged to have the centre accredited for the **matrix** Standard, and TUC brokerage has helped bring the centre and the IA network together.

25

There are other examples. The ULF, for instance, has been the start of a number of joint union and IAG partnership initiatives, including membership of ULF project steering groups by IAG representatives and the provision by the IAG partnership of drop-in, on-site IA sessions for workers and laptop and IAG software for union learning representatives.

26

The prospectus for the ULF includes as a specific key theme "Improving access to learning through high-quality IAG". The prospectus says that "ULF projects will want to demonstrate how they will assure quality development of their IAG provision", and so "particular attention should be given to making strong links with IAG partnerships so that union learning representatives can assist individuals in accessing professional advice and guidance in the workplace". With this kind of encouragement, IA contractors should be pushing at an open door.

27

Conferences and other events organised by the TUC have also played an important part in stimulating union and IAG partnership collaboration, with partnerships giving presentations, running workshops and so on; there are examples of reciprocal arrangements, where the IAG partnership (or a regional grouping of IAG partnerships) has organised an IAG event and worked with the TUC to involve union representatives as participants and workshop presenters.

28

For those starting out on the road to collaboration with trade unions, TUC Learning Services is an ideal point to begin. However, it is important to remember that contacting the TUC cannot, on its own, bring automatic access to a particular trade union or unionised workplace; the TUC is not a union "head office" or overall command body for the union movement. It cannot require individual trade unions to do its bidding, nor can it demand access to a unionised workplace. It is a facilitating organisation which will try to broker contacts, raise awareness of particular issues and promote IAG, in the context of learning, to its affiliates, but it must always act with the consent of the individual union(s) concerned, in the context of any protocols or agreements in place, be they inter-union or with employers, and with other circumstances very much in mind (for example, ongoing industrial relations issues, inter-union tensions, business conditions, and so on).

29

Another important factor to bear in mind is that many TUC staff are not permanent employees of the organisation – their posts are often financed through specific, often quite short-term contracts, including from the LSC, Social Regeneration Budget (SRB), Equal, European Social Fund (ESF) and so on, which are accompanied by specific and stretching achievement targets. You need to be aware that their priorities will be dictated in part by this and by the wider aims of the TUC learning agenda (see Annex A).

30

It should be noted that a survey of IAG partnerships in 2002, *Trade Unions and IAG Partnerships* (Merlin Minds for TUC Learning Services, February 2002), revealed a measure of disappointment on the part of some that contacts they had initiated with TUC Learning Services had not been followed up or returned. A key factor here is that at the time not every regional Learning Services had put in place a worker with IAG responsibility. In practice, now that the network of regional IAG workers is in place, partnerships are most likely to have been contacted by them, and the same will apply in respect of IA contractors from August 2004.

Be proactive in contacting local unions and respond positively to their contacts

31

It is, of course, inappropriate to contact union representatives directly through their workplace, but if you have a union regional office or education centre in your area it is quite legitimate to get in touch with them direct. Your contacts with the TUC should help to identify potential organisations locally, and to facilitate an initial meeting. This could lead to introductions to local learning representatives and thereafter to the start of IA delivery in workplaces.

32

Another possible method of initiating contact is, having identified the players in your area, to add them to the mailing list for your network newsletter. This proved successful in one area, where the learning centre manager at a regional union office got in touch with the network manager after seeing their newsletter, joined up and went through the **matrix** Standard journey.

33

As mentioned in the previous section, if your delivery network is organising an IA event, invitations to local unions could lead to useful contacts and ultimately full-scale collaboration.

34

A common way of promoting awareness of IA delivery networks direct to union learning representatives is through giving presentations about the network and its work to participants on the Front Line Advice and Guidance (FLAG) course. Previous partnerships up and down the country have been involved in this kind of activity and have made useful contacts with trade unions and individual representatives as a result, as well as succeeding in getting themselves and their activities known.

35

In order to get an invitation to present to FLAG courses you need to have good and ongoing contacts with individual unions. There is a section on this later.

Understand the trade union and TUC agenda

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Annex A gives detailed information about the TUC's agenda for learning and IAG; trade union representatives, particularly those in the education arms of unions and, increasingly, union learning representatives, are becoming more aware of IAG, through the efforts of the TUC and others, supported by the activities described in Annex A.

37

Integrating IAG into learning strategies continues to be a key TUC theme, and aims to build the capacity of unions to deliver good-quality IAG in the workplace.

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However, while IAG is very much part of the scene in trade union learning-related activities, there are a number of points that must be borne in mind.





Traditional suspicion of management-imposed training

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Traditionally, employees have viewed with suspicion learning or training programmes introduced arbitrarily by the employer. This has often been because training was linked to job cuts following rationalisation or the introduction of new processes, or offered as part of a redundancy package. Things are beginning to change, but some of those deep-seated suspicions remain.

40

One of the reasons union learning representative activity and trade-union-promoted learning has taken off so powerfully in the past few years is that union learning representatives have the trust of their members; where learning representatives encourage individual members to engage in personal development, and where vocational, job-related training has been jointly promoted by unions and managers, workers' fears are allayed, and they are much more likely to take up the opportunity.

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This is why, in seeking to operate in workplaces, IA delivery networks should ensure they work with unions as well as managers.

Suspicion of "professionals" usurping the position of union learning representatives

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Research into the trade union **matrix** Standard experience found that unions that went through the process, and who linked up with the then local IAG partnerships as part of it, report some initial scepticism on their part. The perception was that working with the partnership, "the professionals", called into question the qualities and abilities of the union learning representatives, and the extent to which their activities could be described as guidance. In engaging with trade unions you will need to placate this opinion, and to explain the complementary roles of representatives and delivery networks; the solid support provided by the previous partnerships to the unions in the research helped to break down barriers relating to this perception. This is a point that must be borne very much in mind as you seek to engage trade unions, and encourage them to work more closely with your delivery network.

Wider strategy for learning

43

Information and advice, whether provided by learning representatives or brokered for their members with outside providers, is just one tool in the union learning representative's toolkit, and is provided not for its own sake, but in the context of a much wider aim: to encourage members to improve their employability skills, engage in broader personal development and to participate in formal workplace learning to acquire or improve vocational skills.

44

In engaging with unions you need to have this very much in mind.

45

Recent research for the TUC, *Trade Unions and IAG Partnerships: Bringing IAG to the workplace* (Merlin Minds for TUC Learning Services, July 2004), found that for some union learning representatives the messages promoted by the previous IAG partnerships, for example at promotional talks at conferences or FLAG courses to trade unionists, lacked relevance or went over their heads. You will need to make sure your message contains a direct resonance with the interests and issues pertaining to trade unionists and the wider context of workplace learning. Once you have got union learning representatives engaged, you will need to maintain their interest and commitment; make sure that network meetings and other gatherings continue to address the issues of relevance and that they are pitched in terms and tones that appeal and make sense to representatives.

46

Other representatives referred to presentations by IAG partnerships in which unions were seen as simply a means to help IAG partnerships meet delivery targets or an access route to employers. If you take this approach, you will not do yourself any favours.

47

Union learning representatives will want to ensure that whatever offer you are making in relation to IA, the end result will be quality provision for their members, tailored to individual needs. They will not be interested in production-line, "one size fits all" support, so you will need to reassure them that what they will get will enhance their input and be of benefit to their members.

Be aware of the role of and constraints on union learning representatives

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There are now over 6,500 union learning representatives and the target is to have 22,000 trained learning representatives by 2010.

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The tasks of the union learning representative are defined as:

- 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 and learning committees
- working with employers to introduce, implement and monitor initiatives that can have benefits for members
- arguing for and taking joint ownership of employee development schemes, which may be based on workplace learning centres
- liaising with Training and Enterprise Councils (now local LSCs), colleges and other organisations to secure resources and support for workplace learning.

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The most important thing to bear in mind when dealing with learning representatives is that they are volunteers. These people have full-time jobs at their place of work, and they carry out their role as learning representatives, encouraging their members to take up and complete learning, and to progress to further learning, in the context of shift and production imperatives, with the permission of their employer and often in their own time. While the Employment Act recognises the status of union learning representatives and requires that employers allow them reasonable time to carry out their duties, many learning representatives operate under difficult conditions.



51

It is for this reason that it is not appropriate, unless expressly agreed, to contact learning representatives in the workplace. People cannot simply be withdrawn from the production line or taken away from their jobs to take a telephone call at the drop of a hat; they may also find it difficult to get time off to attend meetings and training sessions, either because of work requirements or because of objections from the employer, who is paying their wages, or both.

52

You can find out more about the role of the union learning representative from a DVD, *The Role of the Union Learning Representative: A partnership in lifelong learning* (TUC and LSC, 2004), which is available from local LSCs.

53

IA offered by union learning representatives is very much front-line provision, often done in difficult circumstances and with limited resources; it is nonetheless an important feature of the support they offer and, as we have seen above, they may be resentful of "professionals" implying that they are not doing a good job.

54

Trade unions are upbeat in general about their membership of and involvement with IA delivery networks, citing in particular improved access to a broader range of information, time-saving on research on behalf of members and improved quality of service generally.

Focus collaboration on specific activities, and be flexible and imaginative

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As the case studies show, previous IAG partnerships that have successfully engaged with trade unions have been able to do so because the collaboration focused on a particular activity.

The matrix Standard

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As we have seen above, the **matrix** Standard has offered a platform for joint working for a significant number of previous IAG partnerships and trade unions.

57

As part of the TUC's IAG project, a number of trade unions worked towards and achieved the **matrix** Standard. The TUC targeted ULF projects that might be appropriate candidates and, working through regional and national TUC Learning Services, identified unionised sites with established on-site learning centres, particularly those with TUC **learndirect** hub status.

58

The sites involved joined their appropriate local IAG partnerships (where they were not already members) and participated in the partnerships' **matrix** support programmes.

59

The initiative was a major success, with all sites successfully achieving the **matrix** Standard. The accreditation process saw some very positive outcomes, aside from the achievement of the standards. Messages emanating from unions, which you could use as a "selling point" in engaging unions, include the following:

- The process was not as daunting as they first thought.
- By and large, management has been supportive.
- Unions are committed to delivering quality for its own sake, because they are proud of what they do, and want recognition for it.

- You should not tackle the **matrix** Standard simply to get an award.
- The profile and esteem of the union were raised with the local IAG partnership and other opportunities providers.
- It is highly beneficial to have a benchmark against which to measure performance and identify areas for development.
- The **matrix** Standard is perceived as the key to future funding and it is therefore important for unions to get involved.
- Where there are local problems with management support, this tends to be because of a lack of awareness about the importance of promoting work-based learning at central or national level within the union.

60

Further useful lessons arising from this process are that unions found preparation for assessment and the assessment process itself highly beneficial. The main benefits include, in no particular order, that the process:

- encouraged union learning representatives to think carefully about their roles, and the limitations of their abilities to support members through IAG, and to define more closely the services provided to members
- helped improve systems and procedures, particularly record-keeping and client feedback gathering
- gave access to a greater range of learning provision, particularly where in the past the organisation had links to only one or two providers
- resulted in union learning representative time being freed up, through access to a wider range of information that was more up to date
- helped draw attention to equal opportunities needs and suggested better ways of meeting those needs
- highlighted areas for improvement, prompting remedial action.



61

External support, from the local partnership and the matrix advisers, both of which were highly valued, enabled people to step back and view from the outside perspective what was happening (*Trade Unions and IAG Partnerships: Bringing IAG to the workplace* [TUC, an evaluation by Merlin Minds Ltd, July 2003]).

62

The TUC has published a useful case study summary (*Trade Unions and IAG Partnerships: Bringing IAG to the workplace* [TUC, an evaluation by Merlin Minds Ltd, July 2003]) of some of the trade unions that were first accredited to the **matrix** Standard and it is planning a second in the near future. There is also a TUC publication (*The matrix Quality Standard* [TUC, 2004]) which provides a guide to matrix for trade unionists, help with preparation for assessment, sample policies and sources of help. The guide will give a useful insight into the union perspective on the **matrix** Standard.

The Union Learning Fund

63

The ULF has supported a number of projects that demonstrate how IAG partnerships and trade unions can collaborate to bring practical benefits to all concerned. For example, some have included arrangements for an adviser to come to the workplace and provide IAG, by appointment, to those who wanted to discuss in depth their needs and problems. In another instance the IAG partnership made an adviser available to users of a learning centre on a drop-in basis. In other areas, where the union had already forged links with the local IAG network, representatives referred members out on an individual basis. In yet others, the partnership was invited to offer drop-in support as part of a learning open day at the employer's premises.

64

Large numbers of other ULF projects have secured IAG partnership representation on their steering groups.

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There is more about the ULF and its aims at Annex A.

The Quality Development Fund and other sources of funding

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The Quality Development Fund (QDF), administered by the LSC during the financial year 2002–03, supported several local projects that enabled IAG partnerships and trade unions to work together on a range of activities, including further professional development of union learning representatives, the provision of laptops and IAG software to support union learning representatives, newsletters to promote learning, provision of information access points, and many more.

67

Further details of the local QDF projects involving IAG partnership and trade union partnership work can be found in the local QDF case studies publication *Developing Local Information, Advice and Guidance Services: A report on local Quality Development Fund projects, 2002/03* (LSC, September 2003).

68

There are other potential sources of funding available to IAG partnerships, including Local Intervention and Development Fund, ESF, SRB, Workforce Development and so on, which have the potential to support union and IA collaboration on projects that complement and add value to core IA funding.

Employer Training Pilots

69

ETPs offer an excellent opportunity to embed IAG in the workplace, and trade unions, along with the TUC, are actively involved in identifying unionised companies as potential participants. The model employed in some regions involves the TUC team and unions identifying potential ETP sites and working with the LSC and on-site unions to develop learning representatives in the company and put in place access to IAG from union learning representatives and additional support if needed via the local IA delivery network.

70

You will need to work closely with the IAG contract manager at your local LSC, who in turn will need to link up with the ETP or Workplace Learning Team to establish a means of establishing a system to embed IAG into ETPs; this point is also relevant to the section below on strategic partnerships. It is also important to remember that the IA delivery network may not necessarily need to be involved in providing all the IAG in a pilot; union learning representatives are there too, and it is really a question of agreeing the best way to deliver IAG using the resources available in any given scenario.

Redundancy

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While it is right to concentrate on embedding IAG in Workforce Development programmes, it is also important to respond to redundancies. IA delivery networks around the country have linked up with a range of local agencies to provide a rapid response to redundancy, to help threatened employees gain employability skills. The best examples of responses to redundancy are where the on-site union(s) have also been part of that team.

Maintain a communication flow and cultivate relationships

72

It is really only a question of good networking practice, but do make sure that your trade union and TUC contacts are on your mailing list, and are aware of what is happening on the IAG front in the area. Also, when you are working on a specific project or initiative with a trade union or the TUC, remember to ensure that union learning representatives and employers get the same information; you need to avoid a situation where one side knows more than, or has different information from, the other. For example, IAG partnerships and TUC staff involved in ETPs found it helped progress things when everyone, including unions, employers, Business Link and training

providers all systematically received identical information packs and progress reports. Such practices help build trust and foster partnership working.

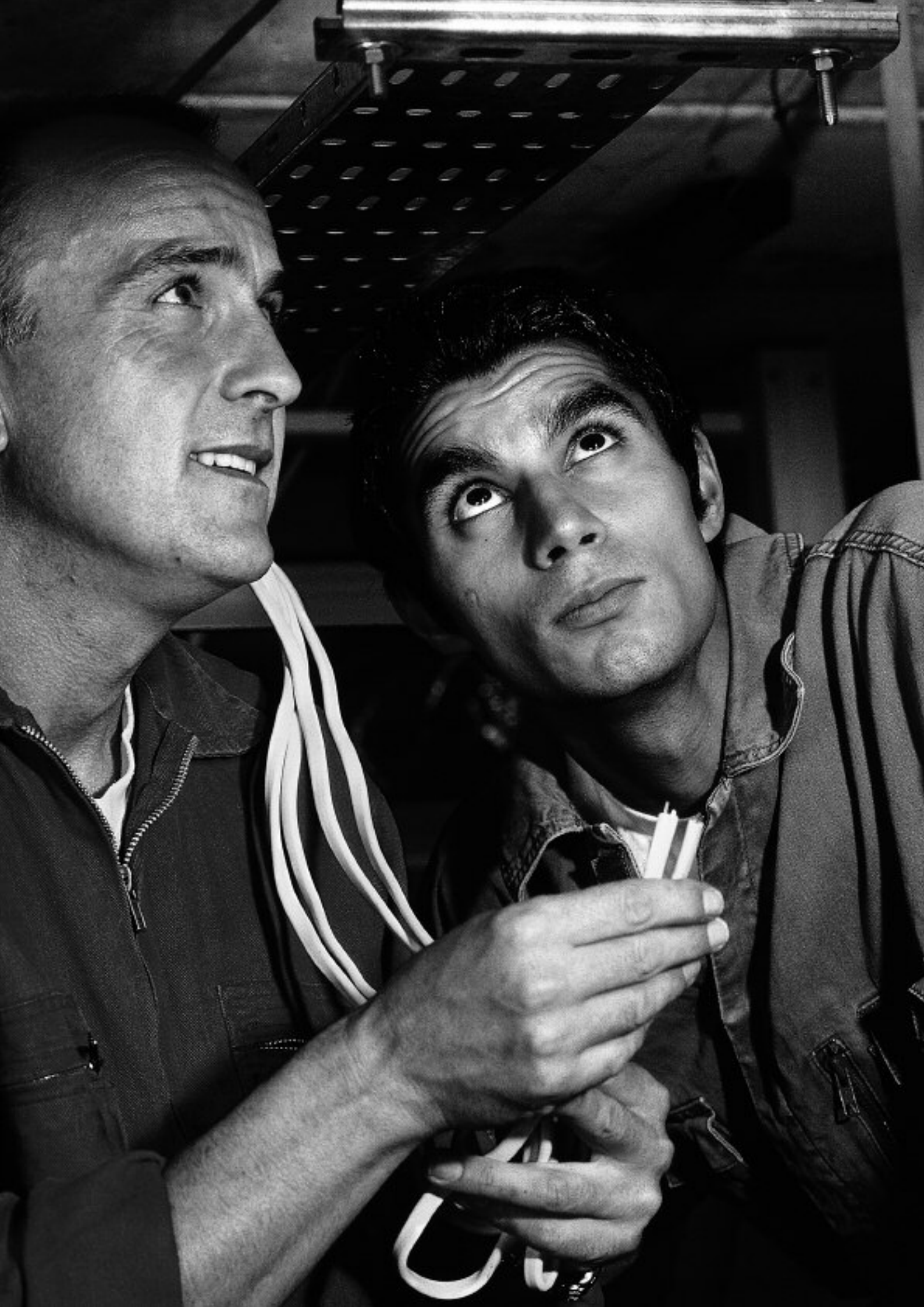
73

We have already seen in previous sections, and from the case studies, that there are a variety of ways to engage and work with trade unions. It is important, even when the union learning representatives you have been talking to have not yet joined the network, or you have not yet begun to work on a particular initiative, that you keep in touch with your contacts. This should include the FLAG course tutors who have facilitated your involvement in the FLAG course, branch, area or regional officials you may have met or spoken to. It is quite simple, but does need working at.

Form strategic alliances with the TUC, trade unions and the Learning and Skills Council, and other key players

74

As we have seen from an earlier section, the best chance of embedding IAG into workplace learning is to link up with the key people; in some areas of good practice there are regular meetings at which IA providers, the TUC, trade unions and the LSC share information and work out solutions to local issues, planning strategic approaches that help further every party's agenda. Returning to ETPs, these have shown in some parts of the country that where the LSC, TUC, unions, IA providers, training providers and Business Link share contact information, jointly plan recruitment strategies and regularly update on progress, the pilots work well. The same principle applies to any such multi-partner initiative. If this is not happening in your area, don't wait to be asked – why not make the first move toward setting up such an alliance? If one exists but you are not part of it, talk to the IAG contract manager at the local LSC about it, and get involved.



Establish joint working and referral protocols

75

There are plenty of examples of the protocol approach around the country. Quite simply, they detail the roles and responsibilities of each party to the agreement in relation to the range of activities the IA delivery network and the trade union or TUC are engaged in. They commonly include, for example, the specific actions the parties are responsible for carrying out under headings such as communication, referral, attendance at meetings, training and so on.

76

Protocols simply embed good practice and make clear exactly who is supposed to do what, leading to productive collaboration. In negotiating such an agreement, each party will get a further insight into the other's priorities and strategies.

77

Remember to include provision for a review and update, to take account of changing circumstances and emerging policies or strategies that could impact on your working together. Clearly, the initiatives referred to in earlier sections lend themselves ideally to incorporation into a working protocol.

78

There is a model protocol at Annex B.

Where appropriate, use trade unions as a deliverer of services

79

A number of the recently reconstituted IAG partnerships have negotiated delivery contracts with trade unions and/or the TUC. This is a highly effective way of supporting the skills agenda, reaching people in the workplace, using available resources effectively and contributing to the achievement of targets. The commonest delivery method is through on- or near-site learning centres, but the examples within this publication also mention peripatetic or outreach service delivery to unionised workplaces.

80

Of course, trade unions as IA providers will be no different from others; they will need to meet the criteria for subcontracting that your network has developed through its procurement policy, and will include **matrix** Standard accreditation, minimum information resources and appropriately qualified staff.

Conclusion

81

This guide to working together has been compiled from good practice researched for the LSC and TUC and in consultation with those organisations. It is intended to help IA delivery networks plan for working with trade unions and is one of a series of practical guides to support continuous improvement and development.

82

Further information on IAG matters related to the trade union movement can be obtained by contacting local LSCs or by referring to the list of contacts at Annex E.

Annex A: The Trade Union Learning Agenda

1

Education, training and lifelong learning have always been on the trade union agenda, and most unions and the TUC have their own educational centres and/or education staff. Traditionally, training has centred on the skills that trade union officials and representatives needed to perform their union duties, such as negotiating, health and safety, and so on. Workplace training, too, has long been a key union issue, particularly in relation to safety, but also specific job-related and technical training.

2

During the 1980s, the political and industrial circumstances prevailing (major shake-outs of labour in traditional industries (and traditional recruiting grounds for trade unions), new sunrise industry (small numbers of employees, no union organisation) and anti-union legislation) caused the movement to search for a new identity and image – of responsibility, positive engagement, and relevance to a new generation of potential members. In this context the TUC reviewed its priorities with unions and identified four key areas for services and action – the new unionism: pensions, equal rights, health and safety, and vocational training.

3

Joint Action on Training was placed at the top of the TUC's agenda in 1989, when Congress received a report – *Skills 2000* – which identified the urgent need for investment in training if Britain was to compete effectively with other industrial economies. Bargaining for Skills (BfS) was launched in November 1994, to help implement TUC policy on training. BfS has since become TUC Learning Services, and offers a direct service to trade unions to help raise the profile of training and increase joint action on learning. It is regionally run and is based at TUC regional offices.

4

BfS produced a large number of publications and practical tools to assist union representatives in getting training onto the bargaining agenda with employers. The seminal *Training for Change* was published in 1995, and was designed to help raise the profile of training with representatives and officials. *Learning in the Workplace* followed in 1997 (revised 1998): this is a handbook detailing the range of (then) government programmes and initiatives and providing bargaining checklists for union representatives to use with employers.

5

Perhaps the most far-sighted development, however, was the notion of a union learning representative, whose role in promoting and facilitating learning amongst members, and in bargaining for training and promoting joint action with employers, would roughly parallel that of the safety or pay and conditions representative. Until April 2003 union learning representatives operated on the basis of goodwill between union and employer (and sometimes without the blessing of the employer, namely refusal to grant paid time off for attendance at courses and so on). However, the Employment Act 2002, whose provisions relating to the status of union learning representatives came into force in 2003, brought into line the rights of union learning representatives with those of shop stewards and safety representatives, that is, they now have statutory facility time to do their union learning representative work, including undertaking training for the role.

6

Until the election of 1997, however, the number of union learning representatives was tiny and relatively insignificant, and although BfS had made considerable progress in promoting trade union involvement in training, its influence was patchy and “non-mainstream”.

7

With the election of the new Government in 1997 the role and influence of trade unions in learning increased exponentially. The TUC Learning Services Committee published in 1998 *Union Gateways to Learning*, which endorsed many government initiatives on lifelong learning and set out a strategy for union involvement in creating a learning society. Trade union representation on a number of key Department for Education and Employment (DfEE) committees ensured the movement's voice would be heard. A number of individual unions produced their own strategies for lifelong learning in the years following the 1997 election, which have been adopted as mainstream issues. Learning has well and truly arrived within the command structure of the union movement.

8

Most influential in turning policy into practice, and initiating widespread changes in rank and file attitudes to learning and increases in participation, has been the Union Learning Fund (ULF). Set up in 1998, the ULF was administered by the DfEE and then the Department for Education and Skills (DfES) until March 2003, when responsibility for it was transferred to the LSC; it aims to promote activity by trade unions which is innovative and which supports the Government's objective of creating a learning society. The ULF is designed to help trade unions to do innovative work that will help to promote, provide and embed lifelong learning in the workplace.

9

The ULF has been responsible for an explosion of activity by trade unions to promote and embed learning. It has made possible the recruitment of hundreds of individuals as learning representatives, and the participation by thousands in learning. It has created dozens of partnership approaches with employers nation-wide, and been responsible for the

take-up of thousands of individual learning accounts (ILAs). It has helped increase awareness of basic and key skills needs, and the establishment of a growing number of Collective Learning Funds. The ULF has helped finance a number of leading edge developments related to learning, key and basic skills and the like. The ULF has helped to raise the profile of learning amongst union members as the route to job satisfaction, security and employability.

10

The TUC, in association with the National Institute for Careers Education and Counselling, the Careers Research Advisory Centre and the then DfEE, produced a briefing for union representatives – *Trade Unions and Lifelong Guidance* – explaining why guidance was important and how unions could play a part. It did not advocate union representatives delivering guidance as a matter of course, although it did open the door for some “on the basis of suitability, interest and willingness to volunteer and undertake the necessary training”.

11

BfS developed in 1998 the Front Line Advice and Guidance (FLAG) course for union learning representatives; with the vast increase in numbers of individuals coming forward to take on the union learning representative role, courses are being run almost continually. The effect has been to raise awareness of what guidance is and how it works in the context of learning, amongst this cohort, and through their influence, to the grassroots. However, the course does not claim to equip representatives to provide guidance, rather it suggests ways in which they can identify the need for guidance and help their members to access services from professionals. Various TUC publications describe the learning representative’s role in relation to guidance as one of brokerage and referral, and emphasise the importance of guidance being delivered by appropriately qualified people.

12

The TUC reviewed the FLAG course in 2002, and introduced additional specialist modules, which include basic and key skills, IAG, mentoring, community group working, and so on. A positive result of this reworked course, linked to the awareness-raising of the DfES- or LSC-funded projects, is that in many cases the local IAG coordinator is routinely invited to address course members and provide contact information. In addition the TUC is encouraging union learning representatives to consider qualifying as NVQ and key skills assessors.

13

Many early ULF projects included components that refer to the development of provision of advice and guidance to learners, but, in reality, the bulk of them have delivered only awareness-raising and the provision of information, while a few take the service as far as advice.

14

The ULF is now in its seventh year and the prospectus has identified seven key themes for development, including “Improving access to learning through high quality information, advice and guidance”.

The Union Learning Fund

The aims of the Union Learning Fund

15

The ULF promotes activity by trade unions in support of the Government’s objective of creating a learning society.

16

It aims to strengthen the role and importance of learning within the workplace and in so doing to drive up the demand for learning.

17

The ULF has a key role to play in helping the LSC meet its targets for improving adult basic skills and increasing the number of adults achieving qualifications at Levels 2 and 3. It also contributes to widened adult participation in learning and drives up employer engagement in workforce development.

18

The fund aims to:

- increase the capacity of trade unions to promote learning and be learning organisations. This is not only about producing new facilities and materials, but also about developing a systematic, longer-term approach to promoting learning within trade unions. Such developments will enable unions to recruit, retain and involve members more effectively
- promote, encourage and support the development and capacity of union learning representatives, particularly in the light of the new statutory rights for union learning representatives and target for a network of 22,000 by 2010
- help unions to engage employers in staff development and more widely in the lifelong learning agenda, by promoting the benefits of a more motivated and skilled workforce to increase organisational performance and productivity levels
- increase learning opportunities for the whole workforce, and especially for groups of employees that may be disadvantaged in accessing learning opportunities, such as part-time workers, shift workers, freelance or contract workers, those with literacy, numeracy or language needs, or those with learning difficulties, disabilities or who may face other kinds of discrimination in the workplace
- provide additional advice, guidance and support for learners
- encourage employers to adopt high-quality accredited training such as Modern Apprenticeships and National Vocational Qualifications
- ensure that projects are sustainable in the long term and that unions work with partners and make links with other government initiatives (from the *Union Learning Fund Year 7 Prospectus* [DfES, TUC, LSC]).



Annex B: A Working Protocol for Information and Advice Delivery Networks and Trade Unions

Contacts

The following people are identified as named contacts with regard to the operation of this protocol:

Name:

Address:

.....

.....

Email:

Tel:

Name:

Address:

.....

.....

Email:

Tel:

Communication

To ensure all parties are kept up to date with accurate information:

- the IA delivery network contract manager will attend TUC meetings and conferences, delivering presentations and literature when appropriate
- the IA delivery network contract manager and the TUC Learning Services project worker will meet on a quarterly basis to review progress
- the TUC Learning Services project workers will attend IA delivery network meetings and any other appropriate gatherings where possible to disseminate information on the work of TUC Learning Services.

Working Practice

TUC Learning Services

IAG literature providing relevant information will be included with newsletters and general mailshots where possible.

The TUC Learning Services project workers will embed IAG services into the union learning representatives' networks and other interested bodies where appropriate by informing them of the benefits of IAG services both verbally and in writing.

Where a TUC Learning Services project worker receives an appropriate response, a referral can be made to the IA delivery network contract manager for a further visit. The following information will be passed on to the IA delivery network contract manager:

- contact name and telephone number.

IA delivery network

The IA delivery network contract manager will supply the TUC Learning Services project workers with appropriate literature to be left with union learning representatives and other interested bodies.

Feedback on any visits to unions as a result of a referral will be given to the TUC Learning Services project worker.

Literature providing relevant information on TUC Learning Services will be disseminated at IA delivery network meetings.

A specific section on the IA website will be developed for the "Workplace" and will include any relevant information on TUC Learning Services and a link from the IAG website to the TUC Learning Services website.

Review

This protocol will be reviewed by both parties on a quarterly basis, effectiveness will be evaluated and any necessary improvements will be incorporated.

Endorsement

For and on behalf of Anywhere TUC Learning Services

Signed: Date:

Name:

Job title:

For and on behalf of Anywhere IA Delivery Network

Signed: Date:

Name:

Job title:

Annex C: Case Studies

Cumbria

1

The learning centres at Furness and Westmorland General Hospitals, run by union learning representatives with the full backing of managers, are well used for formal training and private study. Social Regeneration Budget (SRB) money administered by the information, advice and guidance (IAG) Lead Body financed the purchase of a computer at each site, and has levered in IAG Quality Development Fund (QDF) money to pay for 16 laptop computers, shared equally between the two sites. The origin of this support route lies in a Union Learning Fund (ULF) project established in 2000 in the Morecambe Bay Hospitals NHS Trust, whose aim was to bring training to non-professional support staff in the hospitals involved. The project was led by MSF-Amicus, but involved all the health service unions in partnership.

2

A key to success is accessibility, which in the case of Furness and Westmorland General Hospitals was achieved through the establishment of a learning centre on or near the work site, but the efforts of the ULF project workers in Cumbria went further, by forging strong links to the IAG network, and negotiating drop-in IA sessions on site. This was facilitated by the presence of the IAG partnership on the project steering group. The two hospitals, represented by union learning representatives, became active and enthusiastic members of the IAG partnership in their own right and have achieved the **matrix** Standard.

3

A natural development was to make IA available to Trust employees when no IAG worker was available, particularly, for example, at night times or between unsocial shifts, and the provision by the IAG partnership, from a Quality Development Fund (QDF) project, of laptops for the learning representatives, equipped with appropriate careers software and other packages, was an excellent way forward and represents a good example of ULF, QDF

and SRB funding adding value to IAG money. The laptops are also used by basic skills tutors who run their courses on-site at the hospital.

4

There have been further recent developments with arrangements now in place for the information technology (IT) equipment to be available to support individuals' private studies (for personal and professional or occupational development), through a loan scheme operated in concert with the libraries at the respective hospitals. All laptops are being fully used for both purposes, and represent a major return on investment in relation to making learning accessible to those for whom it would otherwise be difficult or impossible, providing awareness of and exposure to IAG to the employer and employees, upskilling the workforce and tackling basic skills needs.

5

Furthermore, the support from the IAG partnership coincides with the advent of the NHS University, and is adding value to the individual learning accounts (ILAs) that are still available to NHS employees from this source, by providing them with the physical wherewithal to undertake the learning that the ILA allows them to purchase.

6

Under the reformed IAG, TUC representatives will sit on the Strategic Board, cementing the excellent relationship between the IAG network and the trade union movement; additional IAG and TUC activities have included a session on workforce development jointly presented to employers at an LSC-sponsored event and regular keep-in-touch meetings to share intelligence and plan further collaboration.

7

Key features include:

- strategic vision
- strong links to TUC
- link-up through ULF project
- coherence in LSC
- on-site delivery of IAG through outreach
- **matrix** support

- imaginative use of funding streams to add value and complementarity to IAG funding.

Leicestershire

8

When Employer Training Pilots (ETPs) emerged, the local LSC contracted with the TUC to identify and recruit unionised companies to the scheme, and a seminal development was for the TUC worker to be physically housed at the local LSC alongside other staff engaged in workforce development.

9

At first, LSC staff were sceptical about the TUC input and some struggled to understand the IAG role in ETPs, but as the TUC worker explained the position, and reiterated the success union learning representatives had had in securing workforce commitment to learning where managers had not, the LSC team became less sceptical, so that now there is excellent coherence in action.

10

In this area there were already strong links between TUC Learning Services and the IAG partnership and it was not difficult to bring them on board in relation to ETPs. Under the arrangements in place, union learning representatives broker IAG from the network for those of their members who need it; the IAG partnership is setting up exit interviews and sessions for early leavers. Training is preceded by an IAG awareness day where employees hear from learning representatives, the IAG partnership and training providers so that they clearly understand the IAG offer and how it can help them gain the most from their learning.

11

The benefits of IAG are already apparent – people who have struggled getting back into learning, or with skills for life or English for speakers of other languages (ESOL) needs, and people who want a training needs analysis are benefiting from the provision

of IAG as an integral part of the training package to help them make the most of the development available.

12

A “buddying” system is now at the planning stage, in which IAG partnerships, TUC, and LSC staff will together promote ETPs and recruit companies, providing the total package of support; but the partners in this area all agree that the IAG partnership must be involved in ETPs right from the start, and it is vital that first of all, the TUC and IAG partnership must fully understand what the other can bring to the scene and the way in which the efforts of each are complementary; and IAG partnerships, local LSCs and the TUC must all make sure that learning representatives are clear about the IAG offer and how the network can support their input with members.

13

Key features include:

- strategic vision
- strong links to TUC
- coherence in LSC
- embedded IAG
- on-site delivery of IAG through outreach.

Staffordshire

14

The IAG partnership in Staffordshire has long been proactive in engaging with trade unions, as indicated in the various initiatives referred to in the summaries at Annex D. A number of individual trade unions are members of the network, and there is a working protocol in place with the TUC. In addition, the IAG partnership has a seat on the steering group of a local union-run learning centre, and arranges outreach sessions to enable advisers to be available to workers on-site. As a member of the local Redundancy Task Force, it has contributed support to redundees through the provision of basic skills assessment and further help with the acquisition of transferable skills underpinned by IAG.

15

The ETP in this area is not based on employers drawing down funding, rather the issue of a £50 voucher on achievement of a qualification; here LSC staff are well informed on the central role of IAG in learning and the ETP scheme involves the provision of an IAG adviser at every participating employer site. This arrangement could not have been made without the learning representatives being fully aware of IAG and how it can complement their role, and the scheme includes opportunities for awareness-raising sessions with union learning representatives, facilitated by the local LSC, IAG partnership and TUC.

16

The manner in which the ETP is marketed is an excellent example of coherence – like her colleague in Leicestershire, the TUC ETP worker is based at the local LSC, where leads are shared amongst LSC and TUC staff, to maximise recruitment and deploy appropriate expertise; the IAG partnership is involved in the recruitment and planning process, which is aided by a strategic group including the local LSC, TUC and IAG partnership. The next phase will be to arrive at an equivalent arrangement with Business Link.

17

One key lesson from this ETP is to ensure that every player – this includes the local LSC, IAG partnership, TUC, union learning representatives and managers at participating companies, and training providers – shares all information about the ETP and its purpose, progress and successes. Another is that LSC staff responsible for workforce development need to be aware of the role of IAG, and that the IAG partnership must be included in the loop from the start.

18

Key features include:

- strategic vision
- strong links to TUC
- coherence in LSC
- information-sharing as the key to collaboration.

Nottinghamshire

19

The Nottinghamshire IAG partnership had made contact with the TUC when the stricture on engaging trade unions first appeared in the IAG Planning Guidance, but in common with a number of other partnerships at the time found that the official’s workload was too heavy. Since the TUC’s IAG project, however, contacts have increased and a good relationship is beginning to build with the TUC’s IAG worker, who sits on the partnership steering group and also attends meetings of the Basic Skills Advocacy Group.

20

An early initiative involved the TUC calling regular meetings with local union learning representatives to promote IAG, but the consensus was that at this stage it was too soon in the development of the union learning representative network and support infrastructure. However, a glance at the local QDF manual will show a number of QDF projects undertaken in Nottinghamshire, expressly designed to bring unions on board, and the benefits of this development work are now percolating through. An important factor is the commitment of the LSC IAG contract manager to this agenda, and the practical support she has lent.

21

For this reason the IAG partnership was delighted to be approached by the GPMU, which had set up a learning centre at the local university with ULF money, and supported by the local LSC, which purchased a number of laptops for the centre. The learning centre manager was keen to embed quality advice, founded on current information, into the learning provision, and saw the then National Quality Standards for Learning and Work (NQSLW) as the best way to do so. By happy coincidence he was drawn to the IAG partnership when he received a copy of the IAG newsletter.

22

He approached the IAG partnership, joined the network and took advantage of the support programme then in place; when the **matrix** Standard superseded the NQSLW, he switched to **matrix** and successfully achieved the **matrix** Standard.

23

The benefits of membership of the network to the union include a better range of referral options, a broader information base and access to IAG and learning opportunities software; the centre has also had support with the purchase of personal computers for the learning centre, and has forged strong links with other network agencies, particularly the voluntary and community sector. The **matrix** Standard has helped raise the status of the union within the partnership and strengthens funding bids by demonstrating quality; the same factor helps to legitimise the union in negotiating learning provision with employers.

24

A spin-off benefit for the wider network, and therefore to the union, is that the learning centre has received visits from a number of network partners, which has helped them to get a better grasp of the trade union agenda.

25

The centre manager is now encouraging individual union learning representatives to have direct contact with the IAG partnership, which will help reduce their dependency on him, and offer them a development opportunity; to support this he has organised a number of strategic days for representatives in his union, at which initiatives and programmes are introduced and explained, by union as well as LSC and IAG partnership staff.

26

The IAG partnership, supported by the TUC, continues to make contact with other unions on the patch, with varying degrees of success, but recognises that there is much still to do to get the IAG message across to individual union learning representatives and union officials.

27

Their advice is not to try and do too much too quickly, and to keep talking.

28

Key features include:

- strong links to TUC
- link-up through the **matrix** Standard
- support from the local LSC
- imaginative use of funding streams to add value and complementarity to IAG funding
- patience and ongoing dialogue.

West Yorkshire (Leeds)

29

As illustrated in the summaries at Annex D, the West Yorkshire IAG partnership is very active in pursuing engagement with trade unions, but this case study precedes coterminosity.

30

Leeds is well placed for contacts with trade unions – it is home to the regional headquarters of the TUC, TGWU and GPMU. The Leeds IAG partnership had been invited to a range of union events supported by the Equal project, and was involved in providing IAG in response to major redundancies, for example, it was called in by USDAW to provide CV support in group sessions, and by PCS to provide lunchtime drop-in advice sessions.

31

Unifi, GPMU and TGWU have established learning centres in Leeds and have all contacted the partnership in relation to joining the network, participating in the **matrix** Standard support and staff development programmes and generally getting involved.

32

So far, the GPMU centre has achieved the **matrix** Standard and has been contracted by the IAG partnership to deliver advice sessions. Meanwhile the partnership is involved in a ULF bid that will support referrals by union learning representatives to more in-depth IAG for those union learners who need it, and the TUC will sit on the West Yorkshire IAG Management Group.

33

The IAG partnership has been pleased to support union membership of the network and to provide services to union members, and where the union learning centre has achieved the **matrix** Standard – which has been well worth the effort – can identify improved access to information by union members, better networking and improved referrals as advantages.

34

Key features include:

- strong links to TUC
- involvement through invitation
- **matrix** support
- contracted delivery of IAG through learning centres
- participation in ULF bid.



Annex D: Good Practice from Information, Advice and Guidance Partnerships

1

There are pockets of very good practice in terms of trade union and information, advice and guidance (IAG) partnership collaboration, and the following summaries, which are drawn from quarterly reports from IAG partnerships and local Learning and Skills Councils (LSCs) during 2003–04, illustrate the wide range of shapes that joint IAG partnership and trade union work can take.

Information, Advice and Guidance 2003–04 Quarter One Progress Report: Learning and Skills Council

2

The IAG partnership in West Yorkshire is running training for union learning representatives and may become involved in a Union Learning Fund (ULF) project. The Staffordshire IAG partnership has delivered briefing for union learning representatives on one of its courses, and attended the TUC regional conference.

3

Discussions are taking place in Kent about how the IAG partnership can contribute to union learning representative training locally, and a protocol with TUC Learning Services is a possibility. The Employer Liaison Officer in Bournemouth did some IAG awareness-raising at union learning representative network meetings, and developed a union learning representative signposting pack. Hereford and Worcestershire IAG staff made an IAG presentation to union learning representatives at a local company. In Devon and Cornwall union learning representatives attended IAG awareness sessions, and the Somerset partnership is delivering enhanced services

in the form of a two-day course for union learning representatives' personal development.

4

The Black Country partnership bought laptops for union learning representatives, complete with IAG software; these have been very popular and representatives are now delivering IAG in unionised workplaces. The partnership has been invited to TUC Learning Services and Education Service meetings to help strengthen links to the trade union movement.

5

In West of England the partnership and local union learning representatives are developing IAG services in some companies; in Berkshire the partnership has made links with union learning representatives in major local employers.

6

The Gloucestershire partnership is supporting union learning representatives at a learning centre in a major local employer; Milton Keynes, Oxfordshire and Buckinghamshire IAG partnership staff are following up contacts with union learning representatives and setting up exploratory meetings in local companies.

7

Cheshire and Warrington have had TUC Learning Services as a delivery partner for some time, and Greater Merseyside reports that it has a service level agreement and is now working on a delivery contract with the TUC. Under this agreement a union learning representative will be seconded to TUC Learning Services and access national vocational qualification (NVQ) training; the partnership will access co-financing to allow the secondee to deliver full guidance in unionised workplaces.

8

In Hampshire a union learning representative has been invited to join the management group, and union learning representatives have joined the partnerships in Lincolnshire, Staffordshire and Essex. In London North the partnership has made links to TUC Learning Services, including offering support with the **matrix** Standard. Additional links to the Trade Union Studies Department at a local college have ensured that IAG promotional and other material is disseminated by tutors to course members.

Information, Advice and Guidance 2003–04 Quarter Two Progress Report: Learning and Skills Council

9

A series of learning representative courses in Berkshire has taken place, and links have been made with the NHS University and TUC Learning Services representatives.

10

The relationship between Bournemouth, Dorset and Poole IAG partnership and TUC Learning Services continues to flourish, and a joint basic skills, IAG and union learning representative conference is planned. The employer liaison officer has continued to offer specialist training to union learning representatives.

11

Close working relationships between the Cheshire and Warrington partnership and the TUC have been further strengthened by the development of new contracts for peripatetic work with a local employer and with the NHS.

12

IAG awareness sessions in Devon and Cornwall are regularly attended by union learning representatives from across the sub-region; the Skilled Adviser course has a particular unit that covers information in some depth. A direct working relationship has been established with four individual unions, and work continues to improve relationships with another.

13

Discussions are ongoing in Hertfordshire about the possibility of a company or trade union becoming an IAG deliverer; the partnership has been asked to serve on the steering group of an inter-union centre.

14

Discussions took place in Kent with the TUC about making the IAG publicity leaflet available to all union learning representatives and lifelong learning advisers in the county.

15

The London East IAG partnership is a member of the Growth Through Learning Project, working closely with union learning representatives.

16

The Black Country IAG partnership will provide IAG to union members at a local trade union centre, and will offer NVQ training to union learning representatives. The centre will be seeking accreditation to the **matrix** Standard too.

17

A protocol has been developed between the Staffordshire partnership and TUC Learning Services; the IAG Employee Development sub-group has representatives from a number of employee intermediary organisations. An additional six trade unions have joined the partnership so far this year.

18

Union learning representatives from a major employer in the West of England have approached the IAG partnership for support with a Learning Works for All bid, and delivery is expected there soon.

19

A local provider in West Yorkshire has held a training day on IAG for union learning representatives and a further session is planned for Quarter Three.

Information, Advice and Guidance 2003–04 Quarter Three Progress Report: Learning and Skills Council

20

The Birmingham IAG partnership contributed to the TUC Roadshow promoting lifelong learning in the workplace and recruiting union learning representatives in the health and local government sectors.

21

Joint initiatives with the TUC in Gloucestershire to deliver IAG to prison and local government staff have been highly successful: "The TUC is proving to be the most effective broker of IAG services."

22

The Staffordshire IAG is supporting trade union and employer initiatives, including one to establish a community learning centre on an employer's premises.

23

The IAG team in Lincolnshire attend union learning representative lifelong learning committee meetings; in this area one trade union is already a member of the network and a second is now interested in joining. Learning representatives in Tees Valley participate in IAG training needs analysis and career healthcheck training, and some union centres are applying for accreditation to the **matrix** Standard.



24

The Northamptonshire manager has held meetings with the learning representatives' project worker, and in Tees Valley the IAG partnership is represented on TUC project groups. West of England IAG partnership co-ran with the TUC a workshop for learning representatives, and a working protocol is near to being finalised.

25

In Northumberland there has been joint working with a trade union learning programme in a local employer – training is linked to advice sessions for unsuccessful applicants to help them achieve the required standards.

26

In Sussex there was a joint training day involving the IAG partnership, LSC Workforce Development Team and the TUC to look at how IAG can deliver to employees. Union learning representatives in West Yorkshire gave a workshop at the sub-regional IAG conference.

Annex E: Useful Contacts

TUC Learning Services

The Cotton Exchange
Suite 506–510
Old Hall Street
Liverpool L3 9UD

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Learning and Skills Council

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Annex F: Useful Publications

The Role of the Union Learning Representative: A partnership in lifelong learning (TUC and LSC, 2004) (DVD).

The ABC of IAG: How to deliver top-quality IAG to learners at work (TUC, April 2003).

The matrix Quality Standard (TUC, 2004).

The Role of Trade Unions in Phase One of the Employer Training Pilots: A qualitative evaluation (TUC, 2003).

Time off to Train: Union involvement in the Employer Training Pilots (TUC, 2004).

Logging on to Learning: The union contribution to learndirect centres in the trade union hub (TUC, 2004).

Union Learning Fund Year 7 Prospectus (DfES, TUC and LSC).

Developing the Employer and Trades Union Agenda (Research report, LSC, September 2003).

Developing Local Information, Advice and Guidance Services: A report on local Quality Development Fund projects, 2002/03 (LSC, September 2003).



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