

UNISON



BRANCH GUIDE
**TO LIFELONG
LEARNING**

FOREWORD

Dave Prentis General Secretary



For some time UNISON has been at the forefront of developing lifelong learning for trades union members. We know that our members are often held back at work and in society by a lack of skills, lack of training and lack of confidence.

We also know that women, part time workers and those in low paid manual jobs are less likely to be involved in any learning programmes that are on offer. As the largest Trade Union in the UK we have recognised the importance of offering learning opportunities to our members so that they can take their proper place at work, in their communities and within the union.

The unique UNISON approach is to ensure that as many of our members as possible have opportunities for learning to provide them with the skills and confidence to progress and participate fully in all spheres of their lives. Union Learning Reps and Advisers have a key role to play in delivering this for our members.

In recent years UNISON has demonstrated the powerful link provision of workplace and branch learning programmes to recruitment and bargaining in the branch. This guide introduces a step by step approach for branches keen to recruit and build their branches around the learning agenda. It incorporates examples from some of the 2000 plus union learning reps and advisers we've now trained, and from the over 300 branches already recruiting and organising around learning.

The new learning agenda, and our approach to it, allows us the opportunity to build the union around a positive agenda which impacts directly on our core themes of equality and access. It allows us to organise our members by giving them the opportunity to develop the skills and confidence to help themselves at work and in their communities, and consequently increase their participation in the union.

Learning is helping us to build a union fit for the 21st century.

OVERVIEW OF STEPS

The main steps you'll need to take to get organised around learning in the branch are set out below. This isn't a strict step-by-step guide – the stages will overlap – but it does set out the basics to help you tackle inequality, build your members' confidence and skills, and build your branch in the process.



Step 1 Raise awareness
Organising around learning – what's in it for a UNISON branch?

Step 2 Getting organised in the branch
Find out a bit more about UNISON's learning initiatives
Start to develop a branch education team
What do union learning reps actually do?
Training for learning advisers and reps
How do you become a learning adviser or rep?
The branch lifelong learning co-ordinator
Why a team approach?

Step 3 Practical initiatives to promote learning
Surveys and questionnaires
Noticeboards
Open day or drop in?
Gather your information
Publicise specific courses
UNISON Open College courses

Step 4 Talk to your employer
Do some fact finding
Decide what you want to negotiate on
Negotiating checklist
Plan your negotiation

Step 5 Systems and procedures
The learning adviser and reps handbook
Procedure for accrediting learning advisers and reps

Useful information

Model Learning Agreement
ACAS Code
Service group specific information
Summary of current ULF and other projects
Summary of contacts and resources
Example of a survey form

RAISE AWARENESS

Organising around learning – what’s in it for a UNISON branch?



Many thousands of UNISON members have benefited from access to free education courses during the last 10 years.

With the introduction of rights to time off for union learning reps and advisers, UNISON is now going a step further and encouraging branches to engage positively around the learning agenda. So, what’s in it for hard pressed UNISON branches?

Regions have been working with target branches for two years to promote learning and to make the link between learning and organising. Here’s what branches that have engaged in learning have to say:

Organising around learning helps recruit

In Portsmouth Health branch 550 new members joined during the period of a recruitment campaign around learning in 2003 – 4, an increase of 36%.

‘The more learning reps a branch has, the easier it is to recruit... People are just waiting to join. In effect, learning is unionising the workplace.’ *Ellen McGill* branch education co-ordinator Portsmouth Health Branch.

‘I’ve always encouraged people to join the union but they often question what they’ll get for their money. The union is a good way to reach people who’d never think of getting into learning otherwise. Now that’s value for money.’ *Robert Peters* UNISON member

Organising around learning helps develop members’ skills and confidence

‘When I joined UNISON I thought the union was more about helping with grievances. Now that education brings change and activates people to get involved so they can make a difference. Like me, people are realising the union is them and not from outside.’ *Irene Docherty* North Wiltshire County Council, learning adviser and branch equalities officer.

‘The difference it makes for the branch is that it lets all our members know we care about them and shows we’re all part of the union. People who’ve been involved in learning are often more able to raise issues and get their voices heard.’ *Eve Cole*, Redcar and Cleveland Borough Council.

Organising around learning brings in new activists

Since 2003, union learning reps and advisers have had statutory rights to time off to carry out their work in the same way that stewards have. This is a great opportunity to draw into union activity a whole stream of new activists who have been enthused by the learning agenda.

41% of learning reps have never held any other role in the union. Getting involved in learning encourages members to get involved in other ways too. 'As a result of our learning initiative at least five people have taken up new roles in the union – one has become a steward, two are now health and safety reps and a further two are learning reps with new facility time.'

Eleanor Smith, Branch Secretary, Birmingham Women's Hospital branch.

In UNISON:

73 percent of UNISON's members are women – yet only 45 percent of stewards are women

21 percent of UNISON's members are part time workers – but only 7 percent of stewards

41 percent of members earn more than £15,204 a year. But 61.5 percent of stewards earn more than that

(Source: Kerr, Waddington and Perks, The Characteristics, Role and Activities of UNISON Stewards).

UNISON needs to recruit more women, part time workers and low paid workers as stewards and workplace representatives.

Learning opportunities such as Return to Learn, aimed at precisely the groups UNISON needs to target, offer a positive opportunity to encourage underrepresented groups into union activity.

In a recent survey of members completing Return to Learn courses in Northern Ireland we discovered that:

82.6 per cent were women

47.7 per cent were part-time workers

94.7 per cent were paid less than £7 per hour

86.4 per cent left school at age 17 or under

53.1 per cent had no qualifications when starting the course

81.9 per cent were aged over 36 years of age

81 per cent said they had become further involved in learning or intend to do so since undertaking the course and,

28.8 per cent had taken on additional responsibilities since completing the programme including taking up lead positions within UNISON.

(Source: UNISON N.Ireland research project)

So:

Learning = life chances for our members

+ the opportunity to recruit and organise around a positive agenda + building the union.

Organising around learning attracts women and disadvantaged groups who are underrepresented in UNISON

UNISON's learning programmes are targeted at non-traditional learners – those who have been traditionally excluded from learning, and who don't get easy access to training at work. (see opposite)

67% of learning advisers are women, as opposed to around 45% of stewards. Evidence shows that learning initiatives are also attracting black and ethnic minority members into union activity too.

'We now have 21 trained learning reps within Lambeth local government branch. 18 of the 21 are black and 15 are women. The learning agenda offers a potent mixture of personal development and peer group empowerment, well demonstrated by the large number of black women who are now active within Lambeth UNISON.' *Sheila Simpson*, branch lifelong learning co-ordinator.

Organising around learning helps with the bargaining agenda

Working together around learning can be beneficial both to the union and to employers. UNISON has negotiated over 400 workplace learning agreements with employers. These cover issues such as time off for training and the right to time off for learning.

"Industrial relations have really improved." *Birmingham Women's Hospital*.

"People who've been involved in learning are often more able to raise issues and get their voices heard. And it strengthens our bargaining arm with the employer. I've helped negotiate a workplace learning agreement." *Eve Cole*, Redcar and Cleveland Borough Council.

'Working in partnership with Union Learning Reps is a positive way of ensuring staff development needs are met. The relationship thus far has been very positive and we have plans for more joint projects in the future.' *John Williams*, Leader of Derbyshire County Council.

Organising around learning creates opportunities for personal and career development

Many UNISON Open College courses are directly aimed at encouraging low paid staff to access training which can help them progress at work. The diploma in social work and the K100 programme, which leads to a degree level qualification in nursing are both good examples.

'It's changed my life doing further education. Now I'm confident with computers and do more at work.' *Robert Peters*, UNISON member



GETTING ORGANISED IN THE BRANCH

Interested in finding out more? Here are some first steps.



FIND OUT A BIT MORE ABOUT LEARNING INITIATIVES IN UNISON

- Read through this guide - it'll give you a good start
- Talk to your UNISON region. Your regional organiser, regional education officer, lifelong learning fieldworker or branch development worker will be able to tell you about initiatives in your region. Contact information is on page 36 of this guide
- Have a look at the UNISON publications on learning. These are available on the UNISON website to download or can be ordered directly from UNISON Open College and from Communications. A full list is on page 37.

START TO DEVELOP A BRANCH LEARNING TEAM

What is a branch education team?

A group of members who are interested in learning - led by an elected branch officer, usually the branch education or lifelong learning co-ordinator, and comprising learning reps.

What are the first steps?

- Raise the idea of organising around learning at a branch meeting and with colleagues, and invite the regional education officer or lifelong learning fieldworker to a branch meeting
- Get together a few interested members and activists - your education co-ordinator is likely to be a key person
- Have a stall on learning at a UNISON or employer event
- Circulate information about training as a UNISON learning rep around the branch and invite everyone interested in learning to a meeting
- Start to build up the team. Obviously you won't do this overnight, but the branch will probably already have an education co-ordinator, and as interest in learning grows so will interest in training as a union learning rep.

WHAT DO LEARNING ADVISERS AND REPS ACTUALLY DO?

Within UNISON there are both Lifelong Learning Advisers and Union Learning Representatives. Both carry out similar roles. When the roles were first developed, Learning Advisers were usually members who became interested in getting involved in UNISON after attending a learning programme. Learning Reps were often existing workplace reps interested in learning. In practice, the two roles overlap to a great extent, and UNISON has now developed combined training to meet the needs of both learning advisers and reps.

For ease of reference the term union learning rep will be used in this guide to cover both roles, except where it refers to existing learning advisers.

Both learning advisers and reps are enthusiasts and advocates for learning. Their

precise role will vary according to their own circumstances. Some of the roles taken on include to:

- raise awareness of lifelong learning issues in the workplace, especially for non-traditional learners
- help to identify and articulate the learning needs of particular groups of members/potential members
- with the branch education or lifelong learning co-ordinator, liaise with employers on lifelong learning opportunities in the workplace
- work with stewards and branch officers to recruit new members into the branch and to encourage existing members to get more involved through their interest in learning
- contact and talk to members and potential members about how UNISON can assist them in their development
- support members who are on a learning programme
- signpost potential learners to possible providers
- represent and negotiate on behalf of members on issues around learning.

TRAINING FOR UNISON LEARNING REPS

UNISON has developed a training programme to equip Learning Reps with the skills and knowledge that they need to do the job. The training is flexible to reflect the fact that they will have varying training needs. The TUC also offers training that has been adapted to meet the needs of UNISON. Once the first stage of training has been completed, second stage courses are available for learning reps. Courses include Skills for Life, Dyslexia, Information Advice and Guidance and a course for members in the health service on learning in NHS, the NHSU and the Knowledge and Skills Framework. All training is accredited by the Open College Network.

HOW DO YOU BECOME A UNION LEARNING REP?

A UNISON member wishing to become a learning rep will notify the branch education or lifelong learning co-ordinator and the branch secretary. Once the branch has endorsed this, in order to be recognised by the employer, the UNISON branch will have to notify the employer. Within six months of notification the union learning rep will need to have attended recognised UNISON or TUC training. Union learning reps don't have to be elected - there may be more than one adviser or rep in a workplace - but they do have to be ratified by the branch at the Annual General Meeting each year. For more information on the process of accrediting Learning Reps see p18.

WHAT IS A BRANCH LIFELONG LEARNING CO-ORDINATOR?

The UNISON Rulebook now includes the role of lifelong learning co-ordinator. This new role would be ideal for a learning adviser or rep elected by branch members to lead on developing lifelong learning in the branch. The Lifelong learning co-ordinator will:

- work closely with the Branch Education Co-ordinator - the same person may take on both roles
- co-ordinate the activity of union learning reps in the branch education team
- work with colleagues to recruit new union learning reps
- be closely involved in negotiating around learning with the employer
- co-ordinate information on learning opportunities for the branch

- ensure that the work of learning reps is fully integrated into the branch, so that for example the opportunities to recruit new members and new activists around learning is taken up fully.

WHY A TEAM APPROACH?

Working in a team means that the branch can have a co-ordinated approach to learning, making sure that:

- learning reps are accountable and involved in the branch
- recruiting and organising around learning is easier
- learning issues such as time off for learning and access to personal development are not sidelined but are high on the bargaining agenda
- the link between learning and the equalities agenda is highlighted - those groups excluded from learning are also often discriminated against in society and underrepresented in UNISON
- the recruitment and development of learning reps can become part of the normal branch development process
- there is a clear progression route for learning reps who want to get involved in other aspects of the branch.

PRACTICAL INITIATIVES

to promote learning



So, you've found out some more about UNISON's approach to learning and you've found a few people who are interested in getting more involved. What next? This section includes some practical suggestions for initiatives and some examples of resources which you can use in your branch.

SURVEYS AND QUESTIONNAIRES

A good way to start to raise awareness is to circulate a questionnaire to members. You can target this at particular workplaces where there are specific learning needs or you could use it as part of a recruitment initiative to raise awareness. An example from Sheffield Hallam University Branch in Yorkshire and Humberside region is included in this guide page 38.

Surveys are also a useful tool for learning reps to use when they are introducing themselves to members - it may be easier to go and talk to people if you have something specific to ask them about - a survey to complete, for example.

NOTICEBOARDS

Most workplaces where UNISON is recognised will either have noticeboards or will have the employer's agreement in principle to have a noticeboard. Make the best use of them - UNISON produces a number of different leaflets and posters promoting learning and the Open College.

OPEN DAY OR DROP-IN?

Many branches have successfully tried out learning open days - often in Adult Learners Week during May. Activities can include setting up a stall with information on training opportunities, UNISON recruitment literature, lifelong learning branded goodies such as pens and mugs. (All available via your regional lifelong learning fieldworker or education officer).

This has benefits all round:

In 2003, Portsmouth Health branch reported 'unprecedented' interest over adult learner week, recruiting 82 people to learning courses, 20 new members, two new health and safety reps and three workplace contacts.

GET TOGETHER ALL THE INFORMATION YOU CAN ON LEARNING AND TRAINING OPPORTUNITIES

It will be extremely helpful for the branch to have a central store of information about learning opportunities so that when members or potential members express an interest in a particular kind of course, you have suggestions at hand. Sources of information are covered in the learning rep training. But here are some good places

to start:

- the employer's training programme
- Regional Education Programme for activists and members in UNISON
- regional TUC education programme
- prospectus from your local college(s) of further education
- information from the Workers Education Association
- information from the local Learning and Skills Council
- providers of training in your sector – in health, for example, courses provided by the NHSU and your local Workforce Development Confederation

PUBLICISE SPECIFIC COURSES

Once you've identified a training need - computer courses, for example - the next step will be to find out about courses that are available. The information you have gathered above should give you plenty of ideas.

UNISON OPEN COLLEGE COURSES (see opposite for full list)

To maximise the recruitment and organising potential of your courses, find out more about the UNISON Open College programme, and think about approaching your employer to run training as part of a workplace partnership. That way the course will be available to potential members, providing an excellent recruitment opportunity.

The courses are targeted at people without qualifications and concentrate on key communication and study skills (including IT) and confidence building. Delivery is through tutor-led group study, usually evening classes, and self study.

Branch-based offer

You should also find out more about the UNISON Open College's branch-based offer, through which Open College will provide Return to Learn and Women's Lives for your members. The offer also includes discounts on some Open University courses – a great opportunity to offer your members and a really good way of encouraging members to get more involved in the union.

Employer partnerships and learning agreements

UNISON also runs programmes in conjunction with employers. Often workplace learning agreements are arranged on the basis that the employer provides time off or protected time for learning while UNISON arranges the delivery of the accredited course (see working with the employer opposite).

Read through the following section – Working with your employer around learning – before you take the next steps.

For more information on this see below, telephone UNISON Open College or talk to your regional organiser or regional education officer.

WORKING WITH THE EMPLOYER

When Jane Heath, Branch Education Co-ordinator at Staffordshire County Branch, got involved in a working party to upgrade skills as part of the 'Inclusive Learning County' project, she was successful in negotiating essential skills courses for school cleaning staff, with staff getting paid release from County Cleaning Services. This was piloted initially in Burton-on Trent and then expanded to Tamworth with so much success that there is now a waiting list and County Services have placed the course in their pre-NVQ training plan. The branch was able to recruit new members through interest in the course and also recruited 10 learning reps. Jane says, "The icing on the cake was our recent win in the West Midlands Workforce Development Awards 2004."



UNISON OPEN COLLEGE COURSES

Through UNISON's Open College the following courses are available for delivery with support from an employer. Return to Learn and Women's Lives are also offered as part of the internal programme free to members.

Communication at Work: develops practical and relevant skills in written and verbal communication.

Time out for Study: specifically designed for women employees as a first step back into learning.

Women's lives: develops study skills in reading and comprehension, note-taking, writing, analysing and investigating.

Starting Points: a new course that offers a tailor made opportunity for employees who want to brush up on their basic skills. The course has been developed by UNISON and the WEA in conjunction with the Basic Skills Agency so that units are mapped against the emerging national standards for basic skills.

Return to Learn: this is a well-established course suitable for those returning to education. The course can provide an effective stepping stone into vocational and professional training.

Introduction to Computers: designed for those with no (or very little) experience of computers providing hands on experience with plenty of tutor support.

Working in care: a new course designed for employees who have successfully completed Return to Learn or equivalent. It prepares employees for entry into study towards professional qualifications in social care.

Issues in Society Today: designed for UNISON students who have successfully completed Return to Learn or Women's Lives. The course provides a mixture of study skills and content preparing for higher education study in Social Science.

Careconnect Learning

Through Careconnect Learning, the UNISON health and social care hub of Learndirect, UNISON also offers access to extensive IT training courses and courses for learners in the health and social care sector.

TALK TO YOUR EMPLOYER



DO SOME FACT FINDING

Now that you've got some interest in learning in the branch, you should start developing a negotiating strategy to use with your employer. How soon you embark on these steps will depend on a number of factors. Having a workplace learning agreement with the employer will certainly help you to build up interest in learning, but you need to have engaged colleagues in the branch before you sit down with the employer.

Before you do anything, find out what you can about existing agreements. You'll need to explore the following:

- your existing facilities agreement. Does it say anything about learning reps and advisers?
- any previous learning agreements
- the employer's stance on learning? For example, are they interested in the idea of employer 'learning champions'?
- when your facilities agreement will next be reviewed
- whether there are key people who might be interested in the learning agenda – the training manager for example?
- the stance of any other unions who are recognised in the workplace?

DECIDE WHAT YOU WANT TO NEGOTIATE ON

You need to agree what your priorities are. Some of the main issues you will want to address are set out in the checklist below. Many of these negotiating issues may be included within a Workplace Learning Agreement. These agreements will differ from employer to employer. Some will relate to the delivery of a particular set of courses. Others will be a broader statement of principle committing the employer and the union to build a learning workplace.

A model learning agreement with explanatory notes is included in this guide on page 20.

CHECKIST FOR NEGOTIATING AROUND LEARNING

Some key points are included here.

Please see the model learning agreement for additional points and explanations.

	Is this covered? Where?
Time off and facilities for union learning reps and advisers to carry out their work – this should be part of your recognition agreement and facilities agreement, since the learning rep/adviser should be arranging time off in the same way as any other workplace rep. (Note that you should be asking for extra time, not a reallocation of time from other recognised reps.)	
Definitions of what you mean by learning – it should be broader than just the skills you need to do your job.	
Time off or protected time for learning for all staff, including backfill or other arrangements for line managers in order to cover staff absence.	
Commitment to equalities, to include regular audits to ensure that access to training is not limited to certain groups and to ensure that issues around time off are being dealt with.	
The establishment of a learning committee which meets regularly	
Agreement about running specific courses eg from the UNISON Learning at Work programme.	

Plan your negotiation

Work with the branch education team and the branch committee to plan the steps of your negotiation. Use the action planning sheets from the Branch Development and Organising Toolkit (available from the UNISON website Activist Zone or from your regional organiser) to help plan your strategy. You will need to think about:

- what's in it for the employer – see the Employers' Guide to Learning (stock no 2206) for some ideas
- how you can recruit new members around the campaign
- how you can encourage members to get more involved and train as union learning reps
- how to build in regular monitoring and evaluation.

SYSTEMS AND PROCEDURES

Now you have your team together and generated some interest in learning, it is time to make sure that the branch and the employer's procedures are all up to date.



UNISON learning reps handbook

All learning reps should have a copy of the handbook and the postcards and record sheets which accompany it. These help record the members and potential members learning reps have had contact with – crucial so that the branch can organise targeted recruitment. The record sheets can also be a way of tracking learning needs in the workplace, which should be fed into the bargaining agenda.

It is important that the Branch Education/Lifelong learning co-ordinator keeps record sheets and other information about learners securely in order to comply with the Data Protection Act.

UNISON procedures for accrediting learning reps

When a new union learning rep is appointed the regional education officer and regional RMS contact should be informed so that procedures for training them and notifying your employer of their appointment can be put in hand. The new rep's details should be submitted on the activist update form.

Employers should be notified in advance of the learning rep seeking time off for training. Once notification is issued, the rep has six months to attend training. If this deadline is missed, your employer has the right to withdraw recognition from them and refuse to accept a new notification of their appointment.

Once the notification is received by your region, training will be offered to the union learning rep and once a definite training course is accepted by them either:

Your employer will be notified of the union learning rep's appointment and the date of the training course,

Or,

If your branch notifies the employer of newly appointed representatives, you will be sent the details of the training course that the union learning rep has accepted and you can then notify the employer yourself.

APPENDIX 1

Workplace Learning Agreement

In this section you will find an outline of a model workplace learning agreement. This model includes all of the sections that UNISON thinks should be in an agreement, but does not go into detail about how each section should be worded.

Agreements are normally worked out in detail between the employer and UNISON locally, and their exact shape will reflect local circumstances as well as the existing consultative mechanisms. There may also be a need for the inclusion of reference to other unions if your local joint consultative arrangements are channelled through a joint staff side. The following model agreement is included as a resource for branch use at local level and includes some general ideas and ground rules that branches can adapt to suit local circumstances. You will find a general guide to what needs to be in an agreement on the left page and some more detailed guidance notes on the right page through out this section.

Model workplace learning agreement

SECTION 1. Introduction

1.1 Who is involved

This agreement covers the following parties:

Union

Employer

1.2 Links to external organisations

The employer and trade union will liaise jointly with external learning providers and other bodies as appropriate to meet the need of learners.

1.3 Statement of intent

The .. policy has been drawn up to reinforce the importance of workplace learning to ... (employer) and union. It is designed as an overarching policy statement which will deliver effective learning for employees of (employer)

It sets out the rights and duties of union learning representatives and the commitments and responsibilities of union and employer to establish and support joint working arrangements around learning initiatives.

SECTION 2. Principles

2.1 Principles

This policy is based on the fundamental principle that learning should develop the confidence and the skills of the individual, which will benefit them at work, at home and as citizens.

Guidance Notes

*Guidance notes to be read in conjunction with workplace learning agreement.



SECTION 1. Introduction

1.1 Who is involved

If you are negotiating a multi union agreement each union will need to be included here. The Agreement may cover an entire employer or it may be restricted to certain departments. This should be reflected in this section. It would not normally be the case that the learning provider will be included at this formal point of the Agreement.

1.2 Links to external organisations

Although learning providers and other external bodies will not normally be a party to a learning agreement it is very likely that both the employer and the union will have extensive links with external organisations.

Most existing learning agreements involve the delivery of aspects of the UNISON Learning at Work programme by the Worker's Education Association (WEA) and/or other providers.

Employers and unions may also have relationships with other potential funding bodies including Learning and Skills Councils, Sector Skills councils and in the NHS Workforce Development Confederations and NHSU.

1.3 Statement of intent

This is an opportunity to state in broad terms the purpose of the agreement. In the final paragraph under UNISON there is a reference to training. If you are negotiating a multi union agreement it should be made clear that each union will have the right to train its own learning advisers/ reps.

SECTION 2. Principles

2.1 Principles

Even if the agreement is relatively narrow in scope try to include a statement demonstrating UNISON's commitment to learning which is focused on non-traditional learners, which aims to benefit not just the employer but also the learner outside work and as a member of the community.

Include here references to the service group. For example in the NHS it would be important to place the agreement in the context of the NHS's stated commitment to widening participation. It would also be appropriate to refer to the NHS Plan which envisages every member of staff having a Personal Development Plan. See section on pages 32-33 for more information.

2.2 Definitions

Learning in this document refers to learning which is accessible to everyone, for life and for work, and especially for those who have been traditionally excluded from learning. Learning should be flexible and responsive to the needs of learners. Learning is about individual self development but it is also about working together to meet a collective need – be it in the workplace, in the union or in society.

Partnership A partnership is one in which both sides have a contribution to make, and in which all partners recognise the strengths of each partner. The partnership has to be embedded throughout the structures of each partner organisation. An effective partnership is one which has at its centre the needs of learners and which is flexible and dynamic.

SECTION 3. Statement of Intent

3.1 Commitments

Employer

It is the responsibility and aim of (employer) to raise educational achievement and develop lifelong learning so that every individual whatever their age or starting point can realise their full potential in learning, work and within the community. The (employer) commits to implementing the learning strategy from the highest level, to raising awareness and support for the strategy through all levels of the organisation, and to providing the necessary resources to enable this to happen.

UNISON

Trade unions are crucial to the success of encouraging non-traditional learners back into learning. UNISON is committed to working with its members and activists to support learning initiatives and to developing learning reps to encourage and support learners and to enthuse about the benefits of learning.

The union brings to the partnership its experience of championing learning with non-traditional learners, its national Learning at Work programme, and its branch organisation.

The union has/will developed (see notes) a network of union learning representatives and lifelong learning advisers whose role is set out below.

Learning reps and advisers are an integral part of the UNISON branch structure and as such will be supported by the branch committee and will work closely with the branch education co-ordinator as part of the branch education team. The union's network of stewards and workplace contacts are also points of contact for potential learners who can then be channelled to the learning reps for appropriate support and signposting.

The union provides two stages of training for both learning reps, all of which is accredited by the Open College Network.

3.2 A learning audit

(Employer) will carry out an audit of learning across the organisation on an annual basis to identify who is currently accessing learning, and the nature and level of learning taking place, and will monitor regularly access to learning.

In Local Government, a statement placing workforce development in the context of improving public services and the Local Authority's aspirations as set out in its Performance Plan would be appropriate.

2.2 Definitions

Depending on the scope of the agreement you may also wish to include definitions of union learning reps. Their role however will be spelt out in more detail in Roles and responsibilities below.



SECTION 3. Statement of Intent

3.1 Commitments

Employer

It is useful to include as a commitment a reference to ensuring that the employer will seek to implement the strategy at all levels of the organisation, since lack of support or understanding from line managers is often a reason for difficulties in implementing a learning agreement.

UNISON

It is important to be clear that a Learning Agreement with an employer involves more than Learning Reps. This section sets out the central function of the branch and its Education or Lifelong Learning Co-ordinator and team. Any learning agreement should be negotiated by or with the close involvement of the branch secretary and relevant lead officers.

From the employer's point of view this should mean that all branch officers and activists are sympathetic to and supportive of the aims of the learning agreement; from the branch's point of view this enables UNISON to recruit and organise around the positive learning agenda and to benefit from the engagement with the employer around a positive agenda.

3.2 A Learning Audit

The commitment to an audit is an important one, because this will enable the employer and the union to identify which staff are accessing learning opportunities. It is important not to confuse this with a skills audit – the focus should be on how the employer is currently providing for its staff, and on what percentage of training budget and support goes to different groups of staff. The audit could also be a mechanism for monitoring the effectiveness of Individual Development Plans – both to identify whether everyone has them and also their effectiveness as a means of identifying learning and development needs.

3.3 Combating inequality

(Employer) will work to tackle the barriers to learning to ensure that all staff can access learning which meets their needs and the needs of the organisation. (Employer) resolves to work with (union) and the learning provider to identify and address barriers to equality in access to learning including access, and flexibility in learning materials and delivery.

3.4 Time for learning and other resources

(Employer) commits to resourcing fully the learning agreement in order to meet the needs of learners, which may include protected learning time, paid time off, physical space in which to learn or other support.

(Employer) commits to providing physical space and time off and appropriate back fill to enable the running of (specific courses) each year (to be reviewed as appropriate).

3.5 Facilities and time off for union learning reps/advisers

SECTION 4. Mechanisms and Roles

4.1 General Statement

This statement recognises the commitment of the (employer) to an employee learning programme that will help staff pursue learning and development opportunities with support from (Employer). It is recognised that in order to support staff in developing their skills and abilities, a range of support mechanisms will need to be put in place as follows.

This includes:

An annual development assessment review with their line manager to set out a plan for development opportunities for the year ahead. The plan should be reviewed and updated by mutual agreement at least once during the course of the year. This is consistent with good IIP practice.

A clear entitlement to learning and development which is appropriately resourced and supported each year.

An employee assistance programme which will provide information and support for staff who wish to take part in wider learning opportunities.

All staff will have the opportunity for training and learning which meets their own development needs.

4.2 Roles and Responsibilities

Employer

(Name of employer) has a clear responsibility to all employees in relation to their learning, training and development in line with the commitment stated above.

Chief Officer and Senior Management Team

It is the duty of the chief officer and the senior management teams to ensure that all their employees have their right to learning upheld. They must also ensure that all policy and practice pertaining to learning reflects an equal entitlement to learning for all staff.

3.3 Combating inequality

Specific further point to include here should cover how the employer will tackle access – eg ensuring flexibility of delivery to meet the needs of part time workers and shift workers

3.4 Time for learning and other resources

It is important to ensure that there is acknowledgement that different learners will have different support needs. While many learners will want to take advantage of paid time off to learn, others may wish to learn with a group of their colleagues outside of their work hours, or they may wish to take advantage of protected time for learning in the workplace. The agreement needs to acknowledge that learner's needs will vary and that the approach of the employer, union and learning provider should be flexible.

This section of the Agreement should include the specific commitments of the union to identify and develop learning reps and recruit learners.

3.5 Facilities and time off for union learning reps/advisers

Note: this should be in line with existing arrangements for other workplace representatives, and time agreed should be in addition to existing facility time. This section should formally update the recognition and facilities agreement.



SECTION 4. Mechanisms and Roles

4.1 General Statement

Within any worthwhile workplace agreement you will need to include some sections that define the roles of the most important players in the agreement and what mechanisms have been put in place to help you and your employer to jointly achieve the aims of the agreement. UNISON suggests that the “roles and responsibilities” sections will need to be in this part of the agreement. The entitlement to access learning may be linked to a specific joint union/employer training programme.

4.2 Roles and Responsibilities

The Role of the union learning rep and lifelong learning adviser

These are defined on pages 10-11 of this handbook. Branches may find it useful to include a definition of what reps actually do and how they “fit in” to the agreement. Your agreement needs to spell out the fact that learning reps and advisers are union appointments not joint or management appointments.

It is also important to define the role of the chief executive officer/senior manager in relation to learning issues. They need to be involved in order to insure that the issue is taken seriously by other managers and so that any decisions made by the learning committee will result in action.

Managers and Supervisors

Managers have responsibility for ensuring that all staff have access to learning and training opportunities. They have operational responsibility for ensuring that staff can get the necessary time off and that their work is properly covered while they are attending courses or other learning opportunities. All managers and supervisors have a central responsibility for the training and development of employees reporting to them. They are also responsible for ensuring that each employee is made aware of the Workplace Learning Policy and the learning opportunities available to them.

Organisational Development/Training Specialist

All officers with specific responsibilities for the co-ordination, management and/or delivery of learning and development must comply with the Workplace Learning Policy. They must ensure at all times that the Workplace Learning rights of employees are met.

Employees

Employees should think creatively about their own development needs and be prepared to make suggestions to their managers. Employees need also to commit to the courses that they sign up for and including undertaking assignments and projects, which are set as part of the course.

Trade Unions

Trade Unions are crucial to the success of encouraging non-traditional learners back to learning. They need to enthuse workers of the opportunities learning creates, and offer support and encouragement to union learning representatives and lifelong learning advisers.

Union Learning Representatives and Lifelong Learning Advisers

Union learning representatives and lifelong learning advisers will work with members of staff in accordance with the duties and responsibilities outlined in the relevant ACAS Code of Practice. Their functions will include (to be agreed – see pages 10-11)

4.3 A Learning Committee

Comprising representatives of UNISON/ the joint unions, including representatives of learners, and senior management where the arrangements for and monitoring of the success of the learning agreement will be the subject of joint discussion between (employer) and (UNISON/the joint unions)

It would also be useful to define what role the UNISON branch education team will play in the agreement. This will integrate your branch organising campaigns on education into the mainstream bargaining agenda with your employer.

Reference to the ACAS Code of Practice

The rights to time off that came into effect in spring 2003 are outlined Appendix 2. It is important to make reference to them so that at the point the agreement is signed both you and management know what rights the ACAS code gives to learning reps. This will put a stop to disagreements about time off happening later. The time off and any facilities agreed should be in addition to time off agreed in existing facilities agreements.



4.3 The Learning Committee

If the branch (or the joint unions) are going to be discussing training and learning with the employer on an ongoing basis, these discussions will probably need to take place in some sort of committee structure so that proper agreements can be reached and so that we can raise any issues that arise with the appropriate managers who have the power to resolve them. There are different approaches to the Learning Committee: one option is to see it as a negotiating committee which should be a sub committee of the Joint Consultative Committee, another is to see it as a consultative committee on which learners can also sit.

If you adopt the learning committee approach you will need to include some reference to important matters like –

- Who will sit on the committee
- What will be its functions and remit – eg will it be advisory or will it be a negotiating committee. Some issues it may discuss:
 - Setting up courses
 - Reviewing learning audit and acting on its findings
 - How it will address equalities issues
 - How the Committee will fit into the existing negotiating and consultative arrangements
 - How the views of learners and learning reps will be represented on the committee
 - How often it will meet.

The committee's membership should reflect the interests and needs of learners who should, along with learning reps, be represented on the committee.

4.4 Communications strategy

Matters referred to in this policy will be communicated to staff through inclusion in team briefing sessions, notice boards, staff bulletins and via jointly agreed statements from the learning committee.

Meetings of learners engaged in learning programmes and meetings of the branch education team should be facilitated and their views fed into the learning committee.

4.5 Representation and Recognition

(The employer) and (UNISON/the joint unions) recognise the key role of union workplace representatives in the successful realisation of lifelong learning.

The union will appoint union learning representatives and lifelong learning advisers in accordance with its rules. These will be notified to the employer by the union.

The employer will normally allow time off for training within six months of notification of appointment by the union. Learning representatives will be afforded time off to perform their duties in accordance with the relevant ACAS code of practice.

UNISON will provide appropriate training for learning representatives.

SECTION 5. Resolving Disagreements

Should disagreements arise between (the employer) and (UNISON/the joint unions) about any matters covered by this agreement, they will, in the first instance be discussed at the learning committee. Should resolution not be reached at the learning committee, (the employers) normal dispute resolution procedure shall be applied.

SECTION 6. Review and Monitoring

It is recognised that changes may occur which may affect any of the parties to this agreement. Therefore any such changes may need to be considered through joint consultation in the learning committee.

If necessary this agreement may be amended through the normal joint consultative arrangements that exist between (The employer) and (UNISON/the joint unions).

A minimum of three months' notice will be given for proposed changes to this agreement, unless both parties jointly agree to a lesser notice period.

4.4 Communications Strategy

The agreement will need to define how these issues will be communicated to staff, how any new learning initiatives will be advertised to staff. How staff will have the opportunity to have some input in terms of raising issues or suggesting how learning needs can be met.

4.5 Representation and Recognition

The agreement needs to spell out the fact that communication is a two way process and that communications going out from the learning committee need to be jointly owned, they need to be clear and accessible for all members of staff and preferably use different methods to ensure that the message got across.

The inclusion of paid time off for regular meetings of learners and learning reps is also important, in order to ensure that their issues are heard and addressed and that the quality and effectiveness of the programme is monitored.

SECTION 5. Resolving Disagreements

Your agreement needs to include some mechanisms that will ensure that any problems that arise either over issues or the operation of the agreement have a chance of being resolved.

This could be by joint agreement of the learning committee or through the operation of your employers grievance or disputes procedure if all else fails. You should try to specify different levels that such disagreements can be aired at so that you give yourself (and management) a chance to resolve them at the lowest level possible before they become major issues between you.

SECTION 6. Review and Monitoring

All good policies and agreements should include an element of review and monitoring. This is important so that we can oversee how learning in the workplace is progressing and take any action necessary to improve it. In this section it may be useful to include reference to the monitoring role of the learning committee.

You will need to include details of

- How will the agreement (and the workplace learning that it supports) be monitored
- Who will collect and distribute the information to enable you to do this
- How often will the information be provided
- What sort of information you will require
- What will the learning committee do with the information.

You may need to convince your employer that you are not just interested in quantitative data (numbers) but you also need information of a qualitative nature (to do with what learners gained from a particular initiative, how they felt about it).

Finally in this section you may want to add a section that gives you the right to review the agreement as a whole after a defined period. This will give you the opportunity to amend it if that is necessary.



APPENDIX 2: ACAS Code – Guidance on learning reps/advisers



The Employment Act 2002 gave learning reps the same statutory rights as other union representatives. These rights came into force in April 2003 and are set out in the revised ACAS Code of Practice published in February 2003.

Statutory rights include:

Section 1: Time off for Trade Union Duties

1.3 Union learning representatives: 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 notice in writing that the employee is a learning representative of the trade union and the training condition is met.

The functions for which time off as a union learning representative is allowed are:

- Analysing learning or training needs
- Providing information and advice about learning or training matters
- Arranging learning or training
- Promoting the value of learning or training
- Consulting the employer about carrying on any such activities
- Preparation to carry out any of the above
- Undergoing relevant training

Section 2: Training of officials in aspects of employment relations & employee development

2.2 Training for union learning representatives: Employees who are members of an independent trade union recognised by the employer are entitled to reasonable paid time off to undertake the functions of a union learning representative. To qualify for paid time off the member must be sufficiently trained to carry out duties as a learning representative:

- Either at the time when their trade union gives notice to their employer in writing that they are a learning representative of the trade union

OR

- Within SIX months of that date.

All Information taken from ACAS Code of Practice 3: Time off for Trade Union Duties & Activities. For a copy please contact your branch secretary or Regional Officer.

APPENDIX 3: **Service Group specific information**



Local Government Service Group

There have been a number of changes to the National Agreement (Green Book) as part of the 2004 pay settlement. There have been changes to Part 2, Paragraph 3 that covers training and development and Part 4, Paragraph 8. Key points are set out below – for more information please talk to your branch secretary or regional organiser.

Changes to Part 2

(Part 2.3, from paragraphs 3.1 – 3.3)

3.1 Authorities will develop local 'Workforce Development Plans,' closely linked to their service delivery plans, which will provide the focus for the establishment of training and development priorities. Training and development should be designed to meet the corporate and service needs of authorities both current and in the future, taking into account the individual needs of employees. Local schemes on training and development should enable authorities to attain their strategic objectives through development of their employees. Training and development provisions should be shaped to local requirements and take account of the full range of learning methods. Such an approach should enable access to learning for all employees. The needs of part time employees and shift workers need particular consideration.

3.2 Employees attending or undertaking required training are entitled to payment of normal earnings; all prescribed fees and other relevant expenses arising. Employees are also entitled to paid leave for the purpose of sitting for required examinations. When attending training courses outside contracted daily hours, part-time employees should be paid on the same basis as full-time employees. (Assistance for other forms of learning, for example that directed at individual development, will be locally determined). Some training can be very expensive and authorities may require repayment of all or part of the costs incurred should an employee leave the authority before a reasonable time period has expired. The authority's policy in this regard should be made explicit.

3.3 Objectives for training and development programmes should include the following:

- To enable councils to attain their strategic objectives via investment in their employees.
- To promote equity of access to learning.
- To encourage employees to develop their skills and level of responsibility to the

maximum of their individual potential.

- To widen and modernise the skills profile of employees to maximise their versatility, employability and so, job security.
- To enable employees to raise productivity, quality and customer service in pursuit of sustainable improvement

3.4 Authorities should establish local partnership arrangements, to include recognised trade unions, to develop their local workforce development plans. The NJC endorses partnership provision such as the “Return to Learn” scheme. Authorities and the recognised trade unions shall encourage and support employees taking on the statutory union learning representative (ULR) role. This will include agreeing facilities and paid release in accordance with statutory provisions. ULRs should be enabled to play a full part in promoting and implementing local training and development programmes.

Changes to Part 4.8: (Guidance)

Workforce Development Plan Guidelines

2.1 The NJC recommends that plans include:

- Targets and commitments on access to learning.
- The approach to developing Learning Partnerships including any delivery of programmes jointly with the trade unions
- Provisions for ensuring that managers and trade union representatives are jointly trained to deliver the plan
- The approach expected of contractors in relation to workforce training and development.

2.2 The plan should also cover the role of union learning representatives and specify the following in detail:

- Paid time off to attend union learning representative training and accreditation
- Paid time off to attend joint training with managers in connection with developing and implementing the agreement
- Paid time off and facilities to carry out union learning representative duties
- Any paid time off arrangement for employees to consult union learning representatives.

Section 2.3 contains further guidance and action points on corporate strategy, investing in the current and future workforce, implementation and general information and advice.

Health Service Group

Within the NHS there is a strong national commitment to extend learning opportunities to all grades of health service staff. It is recognised that for too long training resources have gravitated towards those with professional qualifications at the exclusion of support staff within the health team. The NHS Document Working Together – Learning Together, A Framework for Lifelong Learning in the NHS, states the following:

‘Access to education and development should be as open and flexible as possible – with no discrimination in terms of age, gender, ethnicity, availability to part time/full time staff, geographical location’

APPENDIX 4: **Current funded projects across the union**



National projects

There are 4 strands to UNISON's strategic union learning fund work, funded until end of March 2006.

Strand 1 Establishing a Culture of Learning

The Culture of Learning project aims to develop union learning reps and lifelong learning advisers across the union. Nine fieldworkers and a national co-ordinator are funded to work in the English regions covered by the English Union Learning Fund. They work with targeted branches to raise awareness of the negotiating and organising issues around the learning agenda, as well as working to develop branch education teams of learning reps and engaging with regional organising staff and employers to help branches negotiate learning agreements with employers.

Strand 2 Basic skills and workforce development with local authority employers

The key aims of this project are to develop literacy, language and numeracy provision with local authority employers, including organisations providing services to local authorities, for example independent care providers. The project aims to develop awareness of skills for life with employers and UNISON structures and to develop a partnership approach to tackling these issues in the workplace through a range of innovative provision.

Strand 3 Getting started in health and care

Strand 3 aims to make links with UNISON branches to win support for the establishment of pre-employment and vocational learning programmes, including - engaging employers in health and social care

- developing partnerships with Job Centre Plus.
- developing outreach work with Community and Voluntary organisations and schools to engage potential learners.

Strand 4 Skills for school support website

Strand 4 is developing a website which will provide an on-line guide to training, development and career pathways for all school staff, covering current and developing roles within all school sectors.

Scotland

A sister Culture of Learning project in Scotland ran during 2003 – 4 and a further project to develop union learning reps and advisers in geographically remote areas and from underrepresented groups will run until end of March 2006. The project will

also develop a Scottish wide network of learning reps and advisers. The Scottish Executive has in addition supported the rolling out of the Return to Learn programme across the NHS in Scotland and a similar project has been agreed for Social Work Inspectorate employees.

Wales

There a number of projects currently underway in Wales, funded by the Wales Union Learning Fund, with further projects to start in 2005. Current projects include:

Caring for Learning in Partnership

This project targets workers from the most disadvantaged groups especially those working in health and social care, lacking basic or key skills or who have low or inappropriate skills and who are less likely to access learning or undertake further training or have limited access to learning in the workplace.

Widening participation

Two projects, in Swansea and in West Wales, which bring together employers, trade unions, training providers and other agencies, which are committed to identifying the learning needs of employees and developing learning opportunities which are relevant, appropriate and valid.

Learning in Trust

This project intends to build strong links with partners across South East Wales and enable low paid workers in the public sector better identification of learning needs and access to good quality learning opportunities. It is hoped this project will ensure equality of opportunity for previously neglected groups of workers.

Basic Skills & Workforce Development

A collaborative workplace development project between NEWI/Yale College/UNISON/WTUC to widen participation in learning among non-traditional and hard-to-reach learners. To address Basic Skills within hard to reach groups and to enhance local practice related to workforce development training, widening participation and the partnership planning agenda.

Northern Ireland

A number of initiatives are going on in Northern Ireland. Branch education team development is continuing through the Union Learning Fund and it is intended to supplement this progress with training for Union Learning Representatives early in 2005.

In addition the Department of Health, Social Services & Public Safety is funding UNISON courses such as Return to Learn, and Communication at Work in eight trusts. These courses are open to all support level staff, but have proved to be a valuable recruiting vehicle. A Lifelong Learning programme of 150 courses is available to UNISON members and this aims to target those members who have not access to current programmes. Alongside this five Return to Learn programmes and twelve K100 places for UNISON members are being funded during 2005. The K100 programme enables health care workers to access nurse training at HE level.

APPENDIX 5:
Some useful contacts and resources
Regional Education Officers (REOs) and learning fieldworkers



EASTERN

REO Jane Rudd / Learning Fieldworker Phillip Kemp
Tel No: 01245 608924
E mail: p.kemp@unison.co.uk

EAST MIDLANDS

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