

# Union Learning Representatives Handbook





# Foreword

Trade unions have always seen learning and skills as being essential for their members and campaigned for the right of working people to develop themselves and to have access to education to help them with their careers and their lives generally.

The trade union role in learning is continuing to grow. NIPSA is taking on a more active role within the movement and our union learning representatives are playing a key part in this.

This handbook is a useful resource for ULRs to help them give the fullest information and support to members.

A handwritten signature in blue ink that reads "Alison Miller". The signature is written in a cursive, flowing style.

General Secretary



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## 1. About this Handbook

“Unions are increasingly recognised for their achievements in opening up access to learning for thousands of workers around the country... yet the benefits of learning go far beyond the benefits for individuals. Unions can and do benefit organisationally. Learning reaches out to a new generation of members and activists - especially women, people from ethnic minorities and young people.”

This handbook is aimed at NIPSA union members who have taken the decision to become a union learning rep within their local NIPSA branch. It is intended as a key resource during your initial training and as a guide to further development and consolidation of your role.

By working through this handbook, you will be able to:

- understand what NIPSA union reps do;
- understand your rights and responsibilities as a union learning rep;
- support and advise members interested in learning;
- utilise existing trade union education and further education (FE) structures;
- integrate your role within existing branch structures and recruit new members;
- influence the employers training agenda;
- consolidate and develop your role through training;
- understand where you can go for help and support.

## 2. NIPSA Activity on Learning

NIPSA activity around learning is growing and taking on a higher profile in the union. As part of our work, supported by the various union learning funds, we collect data on the numbers of union learning reps trained and learning activity among members. We ask all union learning reps to inform their project worker of their activities and successes using the form in **Appendix 4**. Each union learning fund project has its own form and system for submitting this information. Please give your project worker information about:

- the number of members you have engaged in learning;
- the number of members who take an interest in union activity;
- the number of non-members who you persuade to join the union;
- any courses or learning centres you set up;
- any agreements you reach with management;
- any other union activity you take on.

This is important, not only to show the funding bodies that we and our union learning reps are effective in engaging learners, but so the wider union can see that learning activity can bring in new activists and engage new groups of members. Learning is now an important part of NIPSA's activity. As a union learning rep you are central to that.

## 3. The Role of the Union Learning Rep

This section summarises the main areas of activity you will be involved in as a NIPSA union learning rep, your responsibilities and the people you will be working with.

As union learning rep you have an important role to play in finding out what learning opportunities are available in your workplace and locally and helping members to develop new skills.

While the tasks you take on will reflect your interests - and perhaps other union roles you may have - the list below will give you an idea of the range of activities a union learning rep might be involved in. These fall under three main headings:

### 1. Promoting Learning

- Promote learning opportunities;
- Identify members' learning needs using the form in **Appendix 3**;
- Talk to members about the union;
- Give support to members and help them overcome barriers to learning;
- Signpost members to other sources of advice and support;

- Work with learning providers - e.g. local further education colleges;
- Work with organisations such as unionlearn.

## 2. Working with the Union

- Work with other trade union reps;
- Report to the branch committee;
- Build links with the wider union;
- Gather and record information;
- Submit information to the NIPSA learning project workers.

## 3. Raising Learning Issues with the Employer

- Develop awareness of government policies and priorities;
- Find out about the skills needed within the local (or sector) labour market;
- Work with your employer to improve learning opportunities;
- Negotiate on learning and skills as part of the bargaining process.

The role of the union learning rep can differ between branches and groups. If you hold another position in the branch (such as branch secretary) you may also negotiate with your employer on learning issues.

Who you will deal with as a local learning representative will depend on a number of factors but will include:

- union members;
- other workers;
- other union learning reps;
- other union reps;
- learning project workers;
- managers/human resources staff;
- unionlearn project/development workers/ICTU.

You will also work closely with the NIPSA learning project worker in your area who can

put you in touch with other Union learning reps and generally help you in your role.

It is important that union learning reps regularly submit information about their activities and successes to the project worker. This allows the union to demonstrate the effectiveness of the project and secure future funding. As a union learning rep you are the public face of NIPSA in the workplace, so you have an important role to play not just in promoting learning but in promoting NIPSA in the workplace.

A union learning rep should ensure that they work towards recruiting more members into NIPSA, so hold a supply of application forms and signpost queries to the relevant NIPSA rep.

As an elected union learning rep you are expected to support democratic decisions taken by union members and to adhere to union policies.

Union learning reps are sometimes approached by non-members asking for your help. This is an opportunity to discuss union membership with the non-member and to encourage them to join.

## 4. What is Good Learning Rep Practice?

This section sets out some basic ground rules for you to follow in your role as a union learning rep.

You will get the most out of the role of ULR – and members will get the most benefit - if you follow the following guidelines:

- remember that you are a union representative;
- put the individual's learning and training needs at the centre of the process;
- ensure equal support and access to all members, regardless of gender, sexual orientation, religion, race, disability, age, status of employment and skills for life (basic skills) needs;
- understand the needs of different sorts of people and how to work with them;



- develop up-to-date knowledge of local learning provision, including key contact names and numbers.
- build up a good knowledge of other specialist advice, guidance and assessment provision locally;
- know about all available in-house learning opportunities and signposting when appropriate;
- record your successes and report them to the NIPSA learning project;
- finally... remember that union learning reps give initial information and advice. You won't necessarily know all the answers but need to know someone who does.

## 5. Skills for Life

This section explains what is meant by 'skills for life', the government's approach, the differing skills for life needs that members may have and what you, as a union learning rep, can do to help.

Roughly one in five adults – that is, about 7 million people – have some problem with skills for life or basic skills. It's not always clear, however, what is meant by 'basic skills'.

Here are some examples to help you visualise the size and nature of the problem:

- one in five adults can't find the page reference for plumbers from the alphabetical index to the Yellow Pages;
- one in three adults can't work out the area of a room that is 21 x 14 feet, even if they use a calculator;
- one in four adults can't work out how much change they get from £2 when they buy a loaf of bread for 68p and two tins of baked beans at 45p each.

This causes serious disadvantages for workers both at work and in their lives in general. The fact that the problem is so widespread has encouraged unions to support their members and work with employers on programmes that will improve their skills.

Union learning reps need to raise awareness and explain the advantages of an improved

skills base within the workforce. Compared to those with adequate skills, adults with poor literacy and numeracy skills are:

- up to five times more likely to be unemployed or out of the labour market;
- more likely to live in households where both partners are not in full time employment;
- more likely to have children who struggle with basic skills;
- less likely to own their own home;
- less likely to be in good health;
- less likely to be involved in public life, a community organisation or to vote.

### Skills for Life: An Equality Issue

There is a feeling, among employers and often civil, public and voluntary sector workers themselves, that skills for life needs are not something we have to worry about. After all, everyone has their competencies tested before they come to work here, don't they?

It's probably generally true that, as a sector, those workplaces where NIPSA organises suffer less from skills deficits than other groups of workers. But that doesn't mean we can be complacent. Many NIPSA members already have qualifications, but they may have got them many years ago and may not have used particular literacy and numeracy skills for years. How many people feel they can't spell? And how many feel they can't spell to the point where they won't apply for a better paid job in case someone discovers they can't spell?

What about adding and subtracting? And working out percentages? Not everyone needs to be able to do these things in their jobs. However, if you want to move forward in your career, at some point you're going to be dealing with money. Whether it's a budget of £3 billion, or the tea money from the petty cash, you'll need to know the basics of working with numbers. If you don't have them, you won't apply for jobs involving money.

How about dyslexia? This is a learning need that anyone can suffer from. It causes misery and frustration to many people who are perfectly

capable of doing complex jobs and executing tasks with creativity and flair. Their employers may not understand – those afflicted may only have the vaguest notion themselves about their condition. But dyslexia can be managed: there are experts who can help people make sense of the jumble of letters or figures they see in front of them. But first we have to acknowledge it, and then educate people about what it really means for people who are affected.

The challenge now for us now - and for all our learning reps - is to make sure employers recognise the issue and work with us to find a sensitive and effective way of raising skills levels.

### **The ULR's Role in Skills for Life;**

Union learning reps have a key role in skills for life. Increasingly employers are, rightly, taking responsibility for improving the literacy and numeracy skills of their employees. Government Skills' strategy on skills for life is to push employers to do this, but also to work closely with NIPSA and our Union learning reps. This is recognised in the recent guidance for employers from Government Skills - the 'Good Practice Guide' and 'Skills for Life Delivery Template' (both available on the Government Skills website [www.government-skills.gov.uk](http://www.government-skills.gov.uk)).

As a union learning rep you are in a good position to encourage people to do screenings and go on to skills for life courses - your colleagues will trust you and you can give them friendly and confidential support. Members may be nervous about going through the process and they may be concerned that management will use their learning needs against them.

The union learning rep's role in skills for life includes:

- helping to identify the most appropriate provider to conduct skills checks, screenings and diagnostics;
- raising the profile of skills for life;
- encouraging members to do skills checks (or providing them if trained to do so);
- promoting screening opportunities for members;

- encouraging use of the Department of Universities, Innovation and Skills (DIUS) workplace initial assessment tool;
- referring learners to providers for diagnostic assessment and learning;
- making sure employers respect the confidentiality of the learner and their learning needs;
- encouraging learners to take up national qualifications;
- ensuring that learners get time off for screenings, tests and courses;
- ensuring that the employer monitors and evaluates progress on its skills for life strategy.

### **Screening**

Screening is used to find out whether or not a learner might have a literacy, language or numeracy need. If a need is identified, initial assessment can then provide a means of establishing the level(s) of the need. It should result in a reliable indication of a learner's general ability in basic skills.

### **Initial Assessment**

Where screening highlights a need to follow up with initial assessment, providers should use an appropriate system aligned to the National Standards for Adult Literacy and Numeracy (2000). This should provide a reliable assessment of a learner's level in relation to the national standards, so learning can be provided at a suitable level.

### **Diagnostics**

Diagnostic assessment:

- evaluates a learner's skills, strengths and weaknesses;
- indicates the level of each individual skill;
- identifies the specific areas where improvement is needed.

This will always be conducted by a qualified skills for life tutor.

### **Is it Dyslexia or Dyscalculia?**

Dyslexia is most commonly described as difficulty with processing written language. It

affects at least 10 per cent of the population, 4 per cent severely. Often, dyslexic adults weren't spotted at school and so they may not know they are dyslexic.

Dyslexic people will probably have some - or several - of the following difficulties:

- discriminating or 'holding sounds';
- recognising letters or familiar words;
- poor short term memory;
- motor skills such as holding a pen when writing;
- poor sense of time;
- problems with sequencing and organisation.

People who have not had their dyslexia identified may not have very much confidence in the education system - they have usually been labelled negatively at school. This can lead to feelings of low self-esteem or a lack of confidence in their ability to learn despite the fact that dyslexic people are often artistic and talented at creative thinking and problem solving.

Some of the indicators of dyslexia include:

- a history of difficulties in learning to read and write;
- misreading, missing out words or lines;
- difficulty with spelling;
- problems with remembering instructions;
- problems with putting things in sequence;
- the ability to give good oral explanations - yet inability to express the same on paper.

Once a person is identified as possibly having dyslexia it is important that they are encouraged to take part in a full diagnostic assessment. An assessment will be on a one-to-one basis and can take up to 3 hours to complete. The methods for diagnosing dyslexia can vary but will include a series of tasks. Only qualified people should carry out an assessment - e.g. a specialist in adult dyslexia at a local dyslexia organisation, or a specialist tutor within a college.

Dyscalculia belongs to the same group of difficulties as dyslexia. It causes difficulties in

understanding calculations and dealing with numbers. Indications of dyscalculia include:

- getting 'lost' part way through a calculation;
- difficulty with using a calculator;
- reversing numbers;
- confusing signs - e.g. adding instead of multiplying.

### **What can you do to help?**

People who have dyslexia/dyscalculia may fear management or colleagues' reactions. You can offer support and reassurance. You can also suggest that they arrange an assessment - or you can arrange one for them. The addresses of organisations that can help are contained in the 'useful contacts' list at the end of this handbook.

Colleges should be able to provide assistance for learners with additional needs, often called additional learning support (ALS).

### **English for Speakers of Other Languages (ESOL)**

Trade unions need to make sure that learning programmes meet the needs of people for whom English is a second language. People who have difficulty in communicating and understanding English will be held back at work and may not be able, or confident enough, to participate in learning without help. Providers should have specialist ESOL tutors who can assist.

Trade unions also supported the campaign to retain free access to ESOL for migrant workers in 2007.

## **6. The Leitch Review, Government Skills and the Skills Pledge**

This section outlines the 2006 Leitch report on skills, the government's response to it and the opportunities it presents for us as a union and for our union learning reps.

### **The Leitch Review of Skills 2006**

In December 2006 Lord Sandy Leitch produced a report, 'Prosperity for All in the Global Economy: World Class Skills'.

Sponsored by the government the report identified the need to increase productivity by raising the 'economically valuable skills' of the workforce. It set challenges and targets for raising skills levels. The government adopted most of the recommendations in the White Paper 'World Class Skills: Implementing the Leitch Review of Skills in England' (July 2007).

We support the general direction of the reports although we have a number of concerns including:

- a wish to see a greater emphasis on increasing the wider lifelong learning opportunities of the workforce;
- the excessive influence given to employers to determine which qualifications are funded;
- the low targets set for raising the level of skills for life in the workforce.

The Leitch report and the government's response included:

- proposals to double the number of apprenticeship places by 2020;
- positive mention of the piloting of Collective Learning Funds;
- access to free tuition and paid time off for workers to improve their skills for life (literacy and numeracy) and to reach a first level 2 qualification (see 'Skills Pledge' below);
- expansion of the 'Train to Gain' programme to fund workplace-based training towards skills for life and level 2 targets;
- introduction of a pilot for Learner Accounts to fund training to a first level 2 qualification and discounted tuition for level 3 in employer-approved subjects;
- free tuition for those under the age of 25 who wish to obtain a full level 3 qualification.

Leitch's way of making the system more demand led is to route all public funding for adult vocational skills (apart from community learning) through Train to Gain (which responds to employer demand and is not fully applicable

to people working in government departments and agencies) and Learner Accounts (which will fund qualifications approved by employers) by 2010. Leitch did not adopt TUC recommendations around statutory rights for collective bargaining over training.

### **Government Skills**

Government Skills (the sector skills council for central government) has agreed a skills for life action plan, launched in 2007, which aims to get employers to offer literacy and numeracy screenings and courses to their staff.

NIPSA has been instrumental in this and Government Skills recognises that employers will need to cooperate with us and our union learning reps to make it work. Government Skills should be encouraging take up of the action plan across departments and agencies.

### **Skills Pledge**

All permanent secretaries signed a 'skills pledge' in 2007. This commits their department/agency to improve the literacy and numeracy skills of their staff and to help all staff reach a level 2 qualification (roughly equivalent to 5 GCSEs or an NVQ/SNVQ level 2).

Every department and agency has produced a 'Leitch action plan'. The Department for Innovation, Universities and Skills (DIUS) has set the target for the pledge on skills for life as entry level 1 for numeracy and for literacy.

### **The Government's Target**

The government's target is to move from 69 per cent of the adult population qualified to at least level 2 in 2005 to over 90 per cent by 2020. If employer take up of the skills pledge in relation to level 2 training is deemed insufficient by 2010, the government will introduce a legal entitlement to workplace training for workers lacking this qualification (or its equivalent through Train to Gain) in consultation with employers and unions.

### **Opportunities for NIPSA**

The skills pledge and the government's targets on literacy and numeracy set a low target for our sector. We are encouraging negotiators to push for an entitlement to reach level 2 in

literacy and numeracy. This should be done through the appropriate bargaining structures and provides an opportunity for branches and groups to develop campaigns around this.

We have an agreed policy position on the union's skills for life work which gives us an important opportunity to engage with employers on learning and skills. In particular we want to discuss:

- how they will meet the commitment on skills for life and implement the action plan;
- how they will meet the commitment on level 2;
- how they can go beyond these commitments to offer broader learning opportunities to staff.

Ideally we want to get employers to implement the skills pledge through a broader learning agreement (based on the Council of Civil Service Unions/Cabinet Office model learning agreement) which:

- includes full support and facilities for union learning reps;
- goes beyond the minimum level 2 target within Leitch's report and moves to the targets for levels 3 and 4;
- includes a commitment to broader lifelong learning;
- goes beyond the Skills for Life targets set by Leitch (level 1 for literacy and entry level 3 for numeracy): employers should be helping staff to reach level 2 or higher in both literacy and numeracy and helping them reach similar levels in information and communications technology (ICT) skills;
- makes the pledge commitments (particularly those on skills for life) available to all staff regardless of their existing qualifications.

If there is an existing learning agreement, branches may want to amend this to include the above points. For those areas who do not have a learning agreement there is a 'Model' one in **Appendix 2**.

## 7. Interviewing Skills

Your role as a union learning representative will involve interviewing members. This section provides tips and guidance on carrying out one-to-one interviews as well as suggesting specific techniques you can use.

### Initial Learning Interviews

The purpose of an initial learning interview is to:

- explore someone's interest and enthusiasm for learning;
- identify any particular learning needs or goals they may have;
- maintain confidentiality.

Initial interviews should not be long - they are not meant to be an in-depth assessment of need, or diagnosis of skills and competencies. Where such a diagnosis is necessary, the person should be signposted or referred on.

An initial learning interview may take place because of:

- issues that crop up through distributing a learning questionnaire;
- an organisation-wide approach to workplace development involving the union;
- discussions about a separate work-related issue, which the learning representative is already dealing with – or another union rep is dealing with - that relates to learning;
- a specific request for help from a member;
- informal discussions with individual members.

At times things may be more complex for the learning representative:

- when learning needs are the result of changes at work;
- where a member asks for help because they have difficulty at work or problems at home.

### Interviewing Skills

When interviewing members, union learning reps need to use good listening skills.



It is important that the individual's needs are at the centre of the process and they are given the chance to state their needs, receive an empathetic hearing and have their views valued. In this way, members can expect to:

- have the chance to express their initial needs or worries;
- receive clear information about the services and opportunities available to them;
- be given the chance to assess this information and ask further questions;
- receive support and a positive response to their concerns;
- receive accurate information on referrals to other services.

When interviewing members you should spend 70 per cent of your time listening and no more than 30 per cent of your time asking questions and talking.

Trust and confidentiality are vital. Your role will involve:

- discussing interests and needs which may be personal;
- touching on areas of weakness (including actual or perceived loss of status in the eyes of their colleagues or management).

There may be times when the information given could get the member into difficulties with their employer. Union learning reps need to deal with confidential information sensitively as they already do when helping with other problems.

### Respecting Diversity

The relationship between the union learning rep and the member is central to the success of the process. You need to respect and value the member and put yourself in his/her shoes.

Union learning reps need to be able to communicate effectively and be aware of:

- the negative impact of inequality, discrimination and stereotyping;
- how these factors can reinforce previous negative experiences;

- how these factors can prevent people from benefiting from the advice and guidance process.

### Recording the Interview

Union learning reps should record the outcomes of each learning interview on an interview report form. This is actually good practice so we encourage all learning reps to use the standard learner interview form which can be downloaded from the NIPSA website. Union learning reps should send copies of these forms to their branch learning coordinator.

Please bear in mind the requirements for data protection.

### Using Workplace Questionnaires

Using Interviews and the interview report form are a very good way of getting an in-depth picture of a member's learning interests and needs. However if you want to build a more general picture of what people in your workplace or branch want to learn, you can use the NIPSA workplace learning questionnaire which can be downloaded from the NIPSA website. It can be amended to suit your needs.

You can use completed questionnaires as an opportunity to conduct interviews and make yourself known to your colleagues as well as giving you a feel for what people want to learn.

About ten per cent of distributed questionnaires are usually returned. There are many reasons for this and the low rate of return may give the impression that learning is not an issue for staff. However returns to most surveys are low and so you should not be discouraged by this.

Remember, the more you circulate, the more responses you will get, and the more courses you will have to find and advice you will need to give.

The questionnaire can be used strategically to help you plan courses, negotiate with providers and raise issues and demands with management.

### The A-F of Interview Skills

#### (a) Active listening

Active listening is an important skill. It is much more than just hearing. It involves:

- understanding;
- checking;
- memorising;
- selecting relevant points;
- verbal and non-verbal responses;
- summarising.

Active listening is important in helping to:

- create a good atmosphere and helping the person feel at ease;
- receive and check information;
- work out appropriate responses to enquiries.

Five key steps to active listening:

- Concentrate on what the other person is saying – avoid making assumptions;
- Recognise any positive or negative feelings you may have about the person and try to set these aside;
- Find ways of checking your own understanding directly with the person by summarising what has been said;
- Try to keep your own speaking to the minimum – do not monopolise the conversation;
- Learn to close down discussions satisfactorily.

There can be many barriers to active listening, for example:

- preconceived ideas about the person you are interviewing;
- thinking of other things;
- being distracted by emotive words;
- disagreeing with a particular point of view or idea;
- listening for flaws in the other person's argument;
- wanting to express your own thoughts and views;
- prejudice;
- lack of time.

## (b) Questioning

The member's first question may not be the most important one. There are a number of questioning techniques that will help you to explore initial enquiries further.

### Open Questions

An open question does not presuppose a 'yes' or 'no' answer. Examples of open questions are:

"What else can you tell me that might help?" or  
 "What other alternatives have you thought of?"

Questions like these enable you to obtain more information and assist the person in exploring and clarifying their ideas further.

### Paraphrasing

Paraphrasing involves putting the person's question or statement into your own words. This helps to clarify what has been said and encourage the person to give you more information. It shows you have been listening carefully and have understood what the person has been saying. Here's an example of paraphrasing:

"So you'd like to do a City and Guilds qualification, but you are worried about whether you would fit in?"

When paraphrasing, care needs to be taken when dealing with issues that may be sensitive to the member. Paraphrasing can help focus on some of these, but they may need to be raised more directly.

### Reflecting Back

Reflecting is rephrasing a statement or question and sending it – or reflecting it – back to the other person. It is especially helpful in clarifying points, obtaining more information and checking mutual understanding. For example:

"So you want to improve your IT skills, but you're worried about whether the course will be too advanced?"

### Closed Questions

A closed question will most likely be answered by the individual with a 'yes' or a 'no'. For example:

"Do you know how to get to the college?"

A closed question both summarises and helps to bring the conversation back on course if it has wandered. It can help you to close down one topic and move on to the next. It also helps to check mutual understanding quickly.

### Specific Questions

There is only one correct answer to a specific question, for example:

“Do you want to get a qualification at the end of the course?”

The use of specific questions can be a particularly useful approach when you have a talkative individual. In this situation the only way of being sure you get the facts you need is to ask directly.

### Leading Questions

When a leading question is asked the required answer is indicated by the question itself. For example:

“As you have young children, will you be looking for childcare?”

Leading questions should be used with considerable care, as there is a real danger of imposing your own ideas and not learning enough about the person’s needs.

The questions above all demonstrate specific questioning techniques you need to be aware of and use tactically as necessary. However, much of your questioning will come naturally and may well involve a combination of approaches.

### (c) Boundary Setting

It is important to set very clear boundaries at the start of any discussion. The limitations of the discussion (i.e. what will not be discussed) should be made clear. Everything discussed during the interview is confidential.

Key principles when carrying out initial learning interviews:

- don’t be tempted to go outside your own skills and knowledge;
- always refer members on for further guidance or assessment if this is needed;
- be patient with ideas that seem unstructured or unclear;

- recognise that members will sometimes present ideas which hide their real needs — learn to clarify and explore further ideas;
- recognise that some members have low self-confidence (perhaps as a result of a bad experience of education when they were younger) and will need additional support;
- conduct all interviews within an atmosphere of trust and confidentiality.

### (d) Clarifying and Summarising

Clarifying and summarising means checking mutual understanding and agreement.

Effective clarifying and summarising can:

- help identify individual needs;
- ensure mutual understanding about what has been said;
- help members who are confused or unclear;
- pull back a discussion that appears to be wandering;
- reassure the person that their ideas have been understood;
- provide an opportunity for them to check and correct any misunderstandings;
- help to end a discussion by highlighting key points and confirming next steps.

To be able to clarify and summarise effectively it is important to:

- adopt questioning techniques that encourage and enable the person to share and further explore their ideas;
- listen carefully to what the person is saying;
- empathise with the person’s needs and reflect back sensitive issues carefully and discreetly.

### (e) Challenging

Challenging calls into question ideas, points of view or attitudes held by the individual. It will be an important part of many discussions with people about their learning choices.



Challenging, undertaken at the right time and in the right way, can:

- help you test the person's responses (to information, suggestions, ideas, next steps, options and alternative strategies if things do not work out);
- present the person with an issue that needs to be raised but is perhaps being avoided;
- help in the exploration of complicated, unclear issues.

Challenging can call into question aspects of the person's competence, self-image or confidence. It can give rise to negative feelings of discomfort, concern or even crises. Equally, it can have a more positive consequence of helping to promote constructive change in a person's behaviour. Challenges should be positive and constructive at all times and the person should be able to see them as immediately relevant to the discussion.

#### (f) Identifying Next Steps/Setting Targets

Identifying possible next steps is an essential part of the interview process – even if it only involves the member giving some more thought to what they want. Whatever the next steps are, the person must be clear at the end of the interview what happens next, and what he/she needs to do.

In some cases, the next steps will be clear and straightforward; in others they may be more difficult. Either way, some sort of goal or target needs to be set, no matter how small.

All targets should be:

- clear and specific;
- realistic and attainable;
- in keeping with the person's interests and concerns;
- set to a reasonable timeframe;
- based on up-to-date information.

If a next step involves a 'phone call or a visit, full details of the person to be contacted, their address and 'phone number should be provided.

## 8. Working with Providers

This section aims to help you get the most from your local education providers by taking you through the process of setting up learning programmes with them.

For many of your members, the local further education (FE) college will be the most convenient and appropriate place to learn, there may be community based opportunities too. Often you will refer members to the FE College.

However it may be that groups of members identify collective learning needs that the college might be able to meet - for example by providing discounts or even running courses especially for members in your workplace.

### Be Clear About Your Aims

The key to success is to make sure that you and your provider have identified clearly what you want to achieve. First of all you may need to identify your members' particular learning and skill needs. If you decide a course or other learning programme is needed, make sure it's tailored for your members. Sometimes existing FE programmes need to be modified or adapted for your workplace.

You will also need to consider the qualification that is offered – is it suitable and manageable? Changes in the system of work-related qualifications are going to make them much more flexible in future, allowing people to build up units of credit.

### unionlearn Quality Award

By 2010 unionlearn expects over 250,000 learners each year to progress through unions. Unionlearn is working closely with providers to promote high quality, flexible learning opportunities. The unionlearn Quality Award will be awarded to providers who are committed to working with trade unions and can demonstrate that unions and union learners are considered in the design, development and delivery of courses and programmes.

### Funding

More courses can now be funded – including some basic skills courses of three hours. Some learners (particularly those on low incomes

and/or who are in receipt of benefits) may be eligible for reduced or waived fees. Colleges should not charge for 'skills for life' or Essential Skills courses.

### How Long?

The length of the programme will depend on the aims of your learners, the qualification offered and when and where the course takes place. You will know the times that members find most convenient and how long the sessions could be. You will also know whether any of it can take place during work time. The course might be supported by online learning with access to discussion forums and materials through the internet – ask if this is available or planned. Make sure you discuss all these issues with the college.

### What About the Venue?

Discuss the venue with the college. Don't assume that courses must always take place on the main college site. Outreach work is now common and it may be possible for courses to be run at the workplace or in a community-based or learndirect centre. However, you may still wish to access facilities on the main college sites - such as libraries or IT facilities.

### Tutors

Ask about the proposed tutors for the courses and their experience of working with unions. Make sure you have a chance to meet and discuss the courses with them. Discuss any extra specialist support you need. You need to help them understand the best way of meeting your members' learning needs.

### Other Support for Learners

The tutor will give you advice about additional learner support (ALS) that may be available. This could be one-to-one support for maths or English or language support.

### Learndirect Centres

The TUC/ICTU and unions have set up a network of new learning centres in:

- trade union studies centres in colleges;
- union offices;
- workplaces.

These centres offer hundreds of courses - mostly on-line - for union learners. Whether people want to get web-wise and use the internet for information, improve their skills to get a better job or promotion, or learn purely for enjoyment, the centres have something to offer everyone.

To find more information you can visit the following websites: [www.learndirect.com](http://www.learndirect.com) or contact your project coordinator in NIPSA.

### Moving on

After each course, you will want to talk to members about further opportunities. Arrange for everyone to have advice on their next steps. This may be another union course, a further education course, an employer-provided course, or access to learndirect.

## 9. Supporting Learners: Information and Advice

*"We will increase workers' life chances and strengthen their voice at the workplace through high quality union learning."*

unionlearn

This section looks at the information and advice you can access to support members in their learning needs and interests including unionlearn, an electronic tool developed by unionlearn called the 'climbing frame' and the learndirect advice service.

### unionlearn

The TUC/ICTU set up unionlearn in 2006, bringing together trade union education; information, advice and guidance (IAG) for learning; skills for life; and training for union learning reps. Unionlearn's role is to help unions develop and diversify their provision.

### The Climbing Frame

The climbing frame is an electronic tool developed by unionlearn, which allows union learning reps to create pathways of learning and action plans for people that can be reviewed and updated as they progress.

It aims to provide up-to-date information and advice for union learning reps about a broad range of learning opportunities and can be adapted by unions.

1. In addition, the climbing frame allows us to generate accurate profiles of our own learners. It can make life a lot easier for you and help promote the idea of learning in the workplace. The climbing frame has three main functions:
2. Information through the learning themes section which aims to provide a 'one stop shop' source of up to date information and advice for union learning reps about a broad range of learning opportunities. Each learning theme contains a library section and a union learning rep notes section where you can store your own information.
3. Action planning with learners through the learner management section. This enables you to construct a personal climbing frame and action plan with learners which can be regularly reviewed and updated.

Record keeping and data collection through the learner management section to:

- enable you to keep an ongoing record of who you have worked with, when and how often you have met, and actions that have been agreed and implemented;
- provide unions and learning reps with aggregated information to illustrate the profile of their learners.

For learners wanting information and advice on learning or careers the first step might be unionlearn's learning and careers advice service which is operated by learndirect. This provides a free, impartial and confidential service to help union reps and members to develop new skills, improve their job prospects or change jobs.

The learndirect advice service has information on over half a million courses. There is a dedicated telephone number - 08000 92 91 90 - for union reps and members and the service (available in a number of languages) can also be accessed from the unionlearn website [www.unionlearn.org.uk/uladvice](http://www.unionlearn.org.uk/uladvice). Advisers are impartial and can refer learners to a more detailed education or career guidance session.

## Learning Centres

Several NIPSA union learning reps have set up learning centres in their workplaces and some are used to access a range of online and other learning. NIPSA HQ also has a Learning Centre that members can avail of in 54 Wellington Park, Belfast BT6 9DP - The NIPSA Library. Use of their buildings in Belfast and Derry as learning centres is also available.

## 10. Support and Training for Union Learning Reps

There is a considerable amount of help and support that union learning reps can call upon. This section looks at the support that is available within NIPSA, the TUC/ICTU's Unionlearn and other organisations as well as suggesting further courses you may find useful.

### Support within NIPSA;

Your main support will come from:

- your branch (see the section Working with Your Branch);
- your NIPSA full-time officers who can help with negotiating on learning, making contacts at employer and group level and with recruiting and organising activity;
- your NIPSA Training Officer based in NIPSA HQ who can help you get the initial training you need as a union learning rep and signpost you to further training and development;
- the NIPSA learning coordinator can generally provide you with information, advice and support and help you network with other union learning reps;
- NIPSA website;
- NIPSA Reports;
- Quarterly Union Learning Network Meetings;
- NIPSA Union Learning Facebook page;
- Regular emails.

You should contact your NIPSA Learning Coordinator soon after you have completed your training.

## Unionlearn

Unionlearn provides introductory and advanced training for union learning reps and has a network of staff who provide help and support for union learning reps. Unionlearn produces a regular magazine, 'The learning rep' and organises national, regional and local events for union learning reps and other reps involved in learning. Unionlearn can help you on specific initiatives such as skills for life or setting up workplace learning centres. They can also help you make contact with high quality providers. The unionlearn website [www.unionlearn.org.uk](http://www.unionlearn.org.uk) contains a wealth of information and resources for union learning reps.

You can find out the contact details of your local unionlearn team on the unionlearn website [www.unionlearn.org.uk](http://www.unionlearn.org.uk) or by contacting the ICTU office on 028 9024 7940 or via their website [www.ictuni.org](http://www.ictuni.org).

## Other Organisations

You can also get information and support from some of the organisations that campaign on learning and skills:

- NIACE, the National Institute of Adult Continuing Education, seeks to represent the views of adult learners. It organises Adult Learners' Week (every year in May) and produces publications on learning and skills. See [www.niace.org.uk](http://www.niace.org.uk);
- The Campaign for Learning is a national charity which aims to create a passion for learning that sustains people for life. The Campaign for Learning can provide you with a range of resources to encourage learning and make it more effective.
- It organises Family Learning Week and Learning at Work Day. See [www.campaign-for-learning.org.uk](http://www.campaign-for-learning.org.uk).

Training and development for union learning reps

- All NIPSA union learning reps should take the five-day NIPSA Union learning rep course (dates and details are available on NIPSA and ICTU's website and will be issued to ULR's and branch secretaries).

After that there is further training available - it

is usually best to do further training after you have settled into your role (usually after six months of activity).

You may also find it useful to do some of the other NIPSA courses for reps- if you haven't already done so - such as:

- NIPSA Reps Course (10 days). This course is for any new union rep. This 10 week course is an essential introduction to the role of the representative. It is suitable for newly elected representatives or those representatives who have been elected but not yet trained. It will cover the basic skills and knowledge members will need to be an effective representative;
- Regular Union Learning Rep Awareness Seminars will be facilitated to fill the gap between ULR's being appointed and being formally trained.

## 11. Working with Your Branch

As a union learning rep you have an important role to play in encouraging members to take up learning and giving them information and advice on what learning is available.

To do this job properly you need to understand how your NIPSA branch works and make sure you work closely with it. This section outlines how the role of union learning rep fits into wider branch activity.

### The NIPSA Branch

All NIPSA members belong to a branch made up of members who either work in the same locality or for the same employer, so members of your branch might not be just from your workplace/location.

Every NIPSA branch has a branch committee elected annually by members of the branch. More information can be found on the NIPSA website [www.nipsa.org.uk](http://www.nipsa.org.uk) (see 'About NIPSA')

### The Learning Rep and the Branch Committee

As a union learning rep you will be on the branch Committee. It is important that you keep them informed of your activities and report any problems you may be encountering. You can do this in a number of ways, for example by:



- producing written reports or an informal newsletter on your activities;
- attending the branch committee to present short reports or presentations on your work;
- informal but regular contact with branch officials;
- Union Learning Committee.

In addition you may wish to make occasional presentations at branch meetings or organise small-scale learning events (such as taster sessions) at branch meetings in workplaces.

Branches are now being asked to elect a Union Learning Committee **Appendix 5**. Their role is to:

- co-ordinate the work of local union learning reps in the Union;
- Union Learning Committee report to the branch committee on learning activity;
- represent members to management on learning issues;
- Put on the agendas as a standing item.

There will also be regular meetings of all NIPSA ULRs held throughout the year to share ideas and experiences.

### Other Branch Activity

As a union rep you have the chance to get involved in other union activity as well as helping members with their learning needs. All union reps have a responsibility to help build the union – by persuading people to join as well as encouraging members to take on a more active role. You might want to get actively involved in campaigns that we are running. You should also familiarise yourself with the range of trade union education courses that are run in your area so you can advise activists and members what is available – see the NIPSA website for details [www.nipsa.org.uk](http://www.nipsa.org.uk)

## 12. Organising and Communication

This section looks at what being an organising union means in the context of learning and what it means for the way you, as union learning rep, communicate with members and potential members.

### What is an Organising Union?

The way we talk to members, potential members and activists has an impact on their understanding of why NIPSA exists and how we work. It is important that we are clear about the message that we send out.

NIPSA seeks to be an organising union. An organising union in a learning context means:

- the members are the union;
- an organising union is member led - everyone plays their part in ensuring the union is active in every workplace;
- members pay a subscription to become actively involved - they understand the importance of learning and working together;
- members are trained and encouraged to work collectively to campaign for improved opportunities for lifelong learning and other issues;
- the union is proactive - it gives members the power to take up, challenge and resolve issues themselves; non-members are recruited around these issues and this philosophy;
- union learning reps and union officials provide support and advice to help members win on learning in the workplace;
- the union cannot be separated from the workplace, as members and management understand that the workers are the union; the union is directly associated with learning and increasing skills of members.

### Talking to Colleagues About the Union

Every NIPSA rep has a role to play in building the union locally. An essential part of this is communicating effectively with members and non-members alike. As a union learning rep you will have opportunities to talk to your colleagues about their learning needs. You may talk to members who otherwise may not have very much contact with the union. This is a great opportunity to talk to them about their concerns at work, about the union and to get them to do something or (if they are not a member) to join the union.

Before talking to members or potential members, plan your approach taking into consideration the following:

- How much time do you have?
- What impression do you want to give potential members of NIPSA?
- If you want them to join the union, how will they keep in touch with you or other activists?
- What you want to achieve with them and what it is practical to achieve. Do you want them to join the union, do something like go to a meeting, distribute a leaflet, talk to their colleagues about something?
- Do you know who they are and where they're going to be working?
- What about follow up? Who will do it and when?

Here are some helpful hints about communicating one-to-one with members and potential members:

- Organising one-to-one is 70% listening and 30% talking and questioning;
- When asking questions it's best to use open questions (those that cannot be answered with 'yes' or 'no'). Open questions are useful when you need to:
  - gather information;
  - build the conversation;
  - explore issues.
- Closed questions (those that can only be answered with 'yes' or 'no') should only be used when you need to:
  - confirm information you have been given;
  - gain commitment to join the union or participate in an activity/bring the conversation to a close.

For more information about the use of open and closed questions see the section on Interviewing skills.

- You will only achieve 70-30 listening/ speaking by asking open questions. A useful tip is to write down some open questions you can ask before you meet with people: e.g.

*"How do you feel about that?"*

*"What do your colleagues think/feel?"*

*"Where did this begin?"*

*"When did this start?"*

*"What is this really about?"*

*"Why is this so important to you?"*

Finally, don't forget to keep in touch with your branch committee – tell them what you are doing - even if they don't ask - and make sure you know what they are doing.

## 13. Learning and Organising

### Value Learning for its Own Sake

Learning and organising are both important in their own right. If members feel that learning is simply being used as a recruitment tool, you will probably be less successful. Every workplace is different but when planning your learning activities remember to value learning for its own sake.

### Plan for Growth

When planning your workplace learning activities, remember to think about how you can maximise their potential to strengthen workplace organisation or attract new members. So:

- identify sources of local or regional help such as training. Contact your branch secretary or organiser or ICTU for information, help and advice;
- as you think about learning needs, also think about the key challenges to union organisation in your workplace. How can your learning project or activity help you meet those challenges?
- make sure you develop a learning plan or strategy which reflects what members want, not what management wants;
- on multi-union sites, try to have a learning strategy agreed with other unions.

Make your learning initiatives sustainable and involve members - this means new members are more likely to stay in the union.

## Map Your Membership

When developing your workplace learning activities you will need to find out the specific learning needs and issues of your members or potential members. Consider doing a learning needs survey. Think about the particular needs of new groups or members such as young, graduate, ethnic minority, casual, part-time/jobshare or women workers.

Mapping these needs and issues - which will vary within and between workplaces - will give you a better understanding of the issues that really matter to your members. This process will raise the profile of the union. Use your mapping exercise to identify areas of strength and weakness for union organisation in your workplace. For example: Where are your members/non-members? Are men more likely to join the union than women (or vice versa)? Are some departments or sections better organised than others, and if so why? Remember to share this information with branch organisers, activists and your branch committee.

## Mainstream Learning

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

## Negotiate a Learning Agreement

Negotiating a learning agreement helps embed learning in the workplace and secures the employer's commitment to supporting lifelong learning and skills. Working together, with other reps, union learning reps can ensure that workplace learning projects and initiatives support the wider work of the union in the workplace/organisation.

Your project coordinator can help you negotiate a learning agreement and you can also get support from your branch committee and Headquarters official.

## Publicise your Successes

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

- give union learning a high profile – e.g. through posters, noticeboards and newsletters;
- use successful learners to recruit other new members and learners;
- make sure you use the NIPSA Union Learning logo on all learning materials.

Think about how you can include non-members in learning. There is evidence that non-members often join the union as a direct result of our positive work on learning - and enthusiastic learners can be great advocates for the union.

## Encourage Members to Play an Active Role

Some 30 per cent of union learning reps are brand new activists. Think about how you can use your workplace learning activities to encourage more members to play an active role in the union. Publicise and use union learning rep statutory rights to paid time off for training and work (**see Appendix 1**). Encourage members to take on the union learning rep role - or simply ask people to help with the mapping exercise or distributing publicity or information about your activities in their work area.

## Learning and Organising

NIPSA has been promoting learning as part of an overall strategy to raise the profile of the union and communicate with members more effectively, and it appears to be having the desired positive effect on membership growth.

Learning at Work Day and open days are a way for members talking to non-members and getting the message across that way about learning.

## 14. Influencing the Employer's Training Agenda

This section looks at the important role that union learning reps play in helping to embed a culture of lifelong learning in the workplace.

Some employers are supportive of learning.

However, if local management are slow to support learning activity, it is often helps to be able to tell them that senior management is backing the union.

If there is a learning agreement between the employer and NIPSA you can use this to gain support. You can also refer to the government's commitment to the skills agenda and the need for its own departments to reflect this commitment. (See the section on the Leitch review and Government Skills).

Individual line managers may be supportive - you can use support from one line manager when dealing with those who are slower to come on board. Sometimes managers don't want to be the first to do things in case they're brought to task for it later. If you can point out to them that other people in their position are taking the initiative on learning they may be reassured.

Managers may sometimes be responsible for training and development or this may be a human resources function. It is important to identify who is responsible for these issues within the management structure.

### Learning as an Industrial Process

Making learning part of the 'industrial process' means making it a common bargaining area in the workplace as, for example, health and Safety has become. In particular, the TUC and ICTU are calling on the Leitch Review to endorse specific policy proposals to ensure that unions and workers have an equal voice in workplace skills bargaining:

- employers and unions should be incentivised to negotiate on training by including it as a collective bargaining issue in the statutory union recognition procedure;

- the government should examine options to enable trade unions to negotiate more collective arrangements involving the activities of union learning reps - such as learning agreements and workplace learning committees.

Union learning reps are crucial to the process of persuading more employers to work with unions to develop a genuine culture of lifelong learning in unionised workplaces. Once this becomes the norm, rather than the exception, NIPSA and other unions will be in a stronger position to fulfil the mandate of improving the working lives of our members and helping them to realise their potential.

### Negotiating on Learning

If you have another position on the branch, you may have responsibility for negotiating on learning issues. If not, you will need to liaise with another member of the branch committee to get learning issues raised. Some issues will be raised by individuals (e.g. being refused access to a particular training course); other issues will be collective – e.g. negotiating to introduce skills for life screening.

If there is a learning agreement, you should make full use of it. If it is proving unsatisfactory, raise this with the branch and NIPSA Learning Coordinator.

Key objectives for NIPSA in the area of learning and skills, serve as a guide for negotiations and include the following:

- providing fair and equal access to learning for all and targeted intervention for those who need it most;
- learning opportunities should be of the highest quality and be accredited/lead to qualifications;
- learning opportunities should provide transferable skills that assist with personal career development;
- employers should help staff achieve a core set of skills which will help with their current job but which will also equip them for work elsewhere - e.g. literacy, numeracy, communication and ICT skills;



- support for learning that goes wider than the needs of the job – including time, money and on-site facilities;
- a proper learning needs analysis for staff that takes account not only of the organisation's needs, but the staff member's needs as well;
- identification of gaps in learning provision;
- career development structures that are fair, open and transparent;
- involvement, through the union learning rep structure, in learning and skill policies.

# Useful Contacts/Links

These links websites offer a variety of courses and resources for you to use and promote to colleagues, the majority of courses are free but there may be charges for the certificates etc.

## [www.unionlearn.org.uk](http://www.unionlearn.org.uk)

Register for email alerts and get up to date information on events, publications and latest policy on learning.

## [www.bbc.uk/learning](http://www.bbc.uk/learning)

Wide range of free courses including Art and Design, Languages, Science, Business Studies and many more.

## <https://www.futurelearn.com/>

Choose a high quality free course from a range of topics; from Science & Technology to Arts & Humanities, from Body & Mind to Business & Management provided free by high quality universities.

## [www.alison.com](http://www.alison.com)

Wide range of free courses from IT to languages all free but you have to pay for a certificate.

## [www.livemocha.com](http://www.livemocha.com)

Free basic language courses with the opportunity to assist other learners to gain a free more in depth language course.

## [www.learnmyway.com](http://www.learnmyway.com)

Basic IT courses ideal for the beginner.

## <http://openlearn.open.ac.uk/>

Try over 600 free online courses from The Open University. Available from introductory to advanced level, each takes between 1 and 50 hours to study.

## <http://openculture.com>

A wide range of free courses/ebooks and text books covering a wide variety of subjects.

## <https://www.khanacademy.org/>

Free resources to help with a range of educational needs.

## Organisation Website

### Trade Union and associated institutions

ICTU	<a href="http://www.ictuni.org">http://www.ictuni.org</a>
ICTU Union Learning	<a href="http://www.ictu.ie/unionlearning">http://www.ictu.ie/unionlearning</a>
TUC Union Learning	<a href="http://www.unionlearn.org.uk">http://www.unionlearn.org.uk</a>
Labour Relations Agency (LRA)	<a href="http://www.lra.org.uk">http://www.lra.org.uk</a>

### Further Education Colleges and other learning institutions

Belfast Metropolitan College	<a href="http://www.belfastmet.ac.uk">http://www.belfastmet.ac.uk</a>
Northern Regional College	<a href="http://www.nrc.ac.uk">http://www.nrc.ac.uk</a>
North Western Regional College	<a href="http://www.nwrc.ac.uk">http://www.nwrc.ac.uk</a>
Southern Regional College	<a href="http://www.src.ac.uk">http://www.src.ac.uk</a>
South Eastern Regional College	<a href="http://www.serc.ac.uk">http://www.serc.ac.uk</a>
South West College	<a href="http://www.swc.ac.uk">http://www.swc.ac.uk</a>
Libraries NI	<a href="http://www.librariesni.org">http://www.librariesni.org</a>
Union Learn Climbing Frame	<a href="https://climbingframe.unionlearn.org.uk/Home">https://climbingframe.unionlearn.org.uk/Home</a>
Open University (OU)	<a href="http://www.open.ac.uk">http://www.open.ac.uk</a>

### Government

NI Direct.gov	<a href="http://www.nidirect.gov.uk/">http://www.nidirect.gov.uk/</a>
Direct.gov	<a href="http://www.gov.uk">http://www.gov.uk</a>

### Physical and Mental Health Agencies

PIPS	<a href="http://pipscharity.com/contact-us/">http://pipscharity.com/contact-us/</a>
Carecall	<a href="http://www.carecallwellbeing.com">http://www.carecallwellbeing.com</a>
WELL Programme	<a href="http://www.nicswell.co.uk/user/login">http://www.nicswell.co.uk/user/login</a>
Action Cancer	<a href="http://www.actioncancer.org/Home">http://www.actioncancer.org/Home</a>
Action on Hearing Loss	<a href="http://www.actiononhearingloss.org.uk/">http://www.actiononhearingloss.org.uk/</a>
NI Dyslexia Centre	<a href="http://www.nidyslexiacentre.co.uk/">http://www.nidyslexiacentre.co.uk/</a>
Greater Expectations	<a href="http://www.greaterexpectations.org.uk">http://www.greaterexpectations.org.uk</a>
Texthelp	<a href="https://www.texthelp.com/en-gb">https://www.texthelp.com/en-gb</a>

### Legal and Financial Services

MTB	<a href="http://www.mtb-law.co.uk/">http://www.mtb-law.co.uk/</a>
Platinum Financial	<a href="http://www.platinumgroup.co.uk/">http://www.platinumgroup.co.uk/</a>



# Appendix 1

## Time off for Union Learning Reps

### Employment Act 2002/Employment (NI) Order 2003

The following is a summary of the legal rights for union learning reps. The full text is contained in the Code of Practice Time off for Trade Union Duties and Activities (April 2003).

#### Section 1: Time off for Trade Union Duties

**Paragraph 13** Time off to carry out the duties of a ULR Allows Union learning reps reasonable time off to carry out their duties as long as the union has given the employer notice in writing that the employee is a learning rep of the trade union and the training condition is met (see below).

The ACOP also recognises that the role of the ULR will vary by union and by workplace but lists the responsibilities as follows:

- 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 activities;
- Undergoing relevant training.

**Paragraph 15** Payment for time off for trade union duties. The ACOP states that an employer who permits officials time off for trade union duties must pay them for time off taken. The employer must pay either the amount that officials would have earned had they been in work or where earnings vary an amount calculated by reference to the average hourly earnings for the work they are employed to do.

There is no statutory requirement to pay for time off where the duty is carried out at a time when the official would not otherwise have been at work, but staff who work part time will

be entitled to be paid if staff who work full time would be entitled to be paid.

#### Section 2: Training

**Paragraph 18** states that ULRs are permitted reasonable time off during working hours to undergo training relevant to their functions as a ULR.

**Paragraph 20** makes it clear that the training must also be approved by the Trade Union Congress or by the independent trade union of which the employee is an official.

**Paragraph 22** states that 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 ULR. To qualify for this time off the ULR must be sufficiently trained to carry out their duties

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

or;

Within six months of that date.

**Paragraph 23** in the latter case, the trade union is required to give the employer notice in writing that the employee will be attending a training course and notice of when the training has finished. The union also has to give written notice that the training undertaken is sufficient to allow the learning rep to carry out their role. The ACOP also states that it is good practice for the union to give details of the training which has been completed and any previous training that has been taken into account. The six months qualifying period during which an untrained ULR must receive sufficient

training to continue operating as a ULR may be extended, with agreement, to take account of any significant unforeseen circumstances such as prolonged absence from work due to ill health, pregnancy or bereavement.

**Paragraph 24** states that in order to satisfy the training requirement an employee will need to be able to demonstrate to their trade union that they have received sufficient training to enable them to operate competently in one or more of the following areas

- Analysing learning or training needs;
- Providing information and advice about learning or training matters;
- Arranging and supporting learning and training;
- Promoting the value of learning or training.

**Paragraph 25** explains that an employee can demonstrate to their trade union that they have received sufficient training by

- Completing a course approved by the TUC/ICTU or by their own trade union;
- Showing that they have previously gained the relevant experience to operate effectively as a learning rep e.g. previous experience and expertise in teaching, training counselling, providing careers advice, shadowing an experienced ULR.

**Paragraph 26** states that time off should also be considered for further training to help ULRs develop their skills and competencies.

**Paragraph 27** recognises that there would be advantages to the individual and the organisation if the training undertaken leads to a recognised qualification although this is not required by law.

**Paragraph 28** payment for time off for training

An employer who permits time off for officials or ULRs to attend training relevant to their duties at the workplace must pay them for the time off taken. The employer must pay either the amount that the officials or ULRs would have earned had they worked during the time off taken or, where earnings vary with the work done, an amount calculated by reference to

the average hourly earnings for the work that they are employed to do. There is no statutory requirement to pay for time off where training is undertaken at a time when the official would not otherwise have been at work, but staff who work part time will be entitled to be paid if staff who work full time would be entitled to be paid. In all cases the amount of time off must be reasonable.

### Section 3: Time off for Trade Union Activities

**Paragraph 29** states that an employee who is a member of an independent and recognised trade union is also permitted to take reasonable time off during working hours for the purpose of accessing the services of a ULR.

**Paragraph 30** gives examples of trade union activities.

- Attending workplace meetings to discuss and vote on the outcome of negotiations with the employer;
- Meeting full time officials to discuss issues relevant to the workplace;
- Voting in union elections.

**Paragraph 31** for representatives trade union activities can also include:

- Attending branch, area or regional meetings of the union where the business of the union is under discussion;
- Meetings of official policy making bodies such as the executive committee or annual conference;
- Meetings with full time official to discuss issues relevant to the workplace.

**Paragraph 34** states that although there is no statutory requirement that union members or representatives be paid for time off taken on trade union activities employers may want to consider payment in certain circumstances e.g. to ensure workplace meetings are fully representative or to ensure that employees can make use of the services of a ULR.

## Section 4: The Responsibilities of employers and Trade Unions

**Paragraph 35** states that the statutory provisions apply to all employers and the amount of time off should be reasonable in all circumstances. Unions should take into account the wide variety of difficulties and operational requirements when seeking agreements for time off.

**Paragraph 36** states that employers should also bear in mind the difficulties for trade unions in ensuring effective representation.

**Paragraph 37** states that in order to ensure time off arrangements work properly, trade unions should:

- Ensure that officials are aware of their role, responsibilities and functions;
- Inform management in writing as soon as possible of appointments or resignations of officials;
- Ensure that officials receive any appropriate written credentials promptly;
- Ensure that employers receive details of the functions of union officials where they carry out special duties or functions.

**Paragraph 38** covers the facilities employers should make available to officials where resources permit. The facilities could include:

- Accommodation for meetings, a room for ULRs to meet union members to discuss training/learning;
- Access to a telephone and other office equipment;
- The use of notice boards and e-mail and internet/intranet;
- When the volume of work of a ULR justifies it, the use of dedicated office space.

**Paragraph 39** states that when requesting time off to undertake their duties or activities, trade union members and ULRs should give management as much notice as possible and provide details of:

- The purpose of such time off;
- The intended location;

- The time and duration of the time off.

**Paragraph 40** states that ULRs requesting paid time off to undergo training should:

- Give at least a few weeks notice to management of nominations for training courses;
- Provide a copy of the syllabus of the training course.

**Paragraph 41** gives guidance on whether paid time off should be granted and whether the request is reasonable e.g. is there adequate cover for safety, production processes or provision of service. The paragraph also states that unions and managers should seek to agree mutually convenient times e.g. towards the end of a shift or the working week, before or after a meal break. The paragraph further states that consideration should be given for the provision of a room in which ULRs can discuss training in a confidential manner.

**Paragraph 42** states that employers need to consider each application for time off on its merits, and might consider the reasonableness of the request in relation to agreed time off already taken.

## Section 5: Agreements on time off

This section provides guidance around agreements on time off between employers and trade unions.

**Paragraph 43** states that a formal agreement can help to:

- Provide clear guidelines against which applications for time off can be determined;
- Avoid misunderstandings;
- Facilitate better planning;
- Ensure fair and reasonable treatment.

**Paragraph 44** states that agreements should specify:

The amount of time off permitted.

- The occasions on which time off can be taken;
- In what circumstances time off will be paid;

- To whom paid time off will be paid;
- The procedure for requesting time off;
- The procedure for resolving grievances about time off.

**Paragraph 45** suggests that it would be sensible if agreements made clear:

- The arrangements for appropriate payment of wages when time off relates to union duties in part and to union activities in part;
- Whether payment might be made to shift and part time workers carrying out union duties outside their normal working hours.

**Paragraph 46** states any agreements for time off for union reps should be consistent with wider agreements which deal with issues such as constituencies, number of representatives and the election of officials.

**Paragraph 47** recognises that in smaller organisations more flexible arrangements for time off may be needed to accommodate their particular circumstances.

**Paragraph 48** makes it clear that even if no formal agreements exist ULRs are still entitled to their statutory entitlement. Nor can any agreement supersede statutory entitlement.

## Section 7: Resolving disputes

This section gives advice on the process of resolving any disputes regarding time off work for union duties or activities.

**Paragraph 50** states that every effort should be made to resolve disputes or grievances in relation to time off work for union duties or activities. However, where the grievance remains unsolved ULRs and members have the right to complain to an industrial tribunal. Such complaints may also be resolved by conciliation by ACAS/LRA and if this is successful no tribunal hearing would be necessary.

### Useful websites/contacts

NIPSA is not responsible for the content of external websites

- Basic Skills Agency;
- British Dyslexia Association  
Helpline: 0118 966 8271;

- British Dyslexics - Telephone: 01352 716656;
- Bristol Dyslexia Centre - Telephone: 0117 973 9405;
- Campaign for Learning;
- Government Skills;
- Investors in People UK;
- learndirect;
- Learning and Skills Council
- Modern Apprenticeships;
- Move On;
- Qualifications and Curriculum Authority
- National Institute of Adult Continuing Education (NIACE)
- Skills for Justice;
- Trade Union Congress;
- unionlearn.

Also see the 'Useful Contacts/Links section on page 20-21 of this Handbook.

The PDF version of the Union Learning Handbook can be downloaded from NIPSA's website [www.nipsa.org.uk](http://www.nipsa.org.uk)



# Appendix 2

## Learning Agreement

For union learning reps who are looking to reach a learning agreement with their employer, NIPSA has a model learning agreement which is attached.

A learning agreement will focus employers to promote and support lifelong learning activities and opportunities inside and outside the workplace.

It will help employers recognise the role of the union learning rep in representing the views of NIPSA members on learning issues and in

providing advice and guidance about learning opportunities and initiatives.

Union learning reps are crucial to the sustained development of learning in the workplace. You can find more information on the NIPSA website [www.nipsa.org.uk](http://www.nipsa.org.uk)

Regular information on what NIPSA union learning reps are doing can be found in the monthly newsletter for NIPSA union learning reps which is also available on the NIPSA website and in NIPSA News and NIPSA Reports.

**Draft**

# Model Union Learning Agreement between NIPSA and (Organisation)

## Introduction

The employer and trade union recognises the benefits that comes from lifelong learning for the employer, the individual and the union.

The employer and trade unions are committed to working together to promote and support lifelong learning and to ensure fair and equal access to learning opportunities inside and outside the workplace.

Both parties will encourage staff to take up learning activities and share responsibility for developing and maintaining a learning culture within (Organisation).

Both parties will work to build upon departmental and governmental learning initiatives. The employer recognises that Union Learning Representatives (ULRs) are essential to developing the learning culture in the workplace.

## Aims

- To build a joint learning strategy in (Organisation);
- To encourage the staff within the workplace to participate in Lifelong Learning;
- To provide access to Lifelong Learning;
- To establish a learning centre within the workplace;
- To build upon the Government's current learning initiatives;
- To work with relevant organisations such as Education Guidance Service for Adults (EGSA) to ensure the learning initiative is a success;
- To support the role of the NIPSA Union Learning Representative.

## Who the Agreement Covers

This agreement covers all full and part-time employees of (Organisation).

The employer will undertake to ensure that this agreement will not be used as an alternative to collective bargaining with NIPSA and agrees to maintain and use existing negotiating procedures and arrangements other than those specified in this agreement.

The parties agree that all individual grievances arising from any educational or learning initiative shall be subject to the existing grievance procedures.

## The Establishment of a Union/ Employer Joint Learning Committee (JLC)

The parties agree to establish a Union/Employer Joint Learning Committee (JLC), which will be responsible for introducing, implementing and monitoring learning initiatives.

The main responsibilities of the committee will include:

- Identifying the learning needs of both the members and the employer;
- Prioritising learning needs;
- Identification of those groups and individuals who are to benefit from the various learning initiatives;
- Producing a realistic Learning Plan (LP), setting goals and targets for the learning provision within the workplace, which will include establishing a learning centre;
- Establishing the standards for learning;
- Determination and monitoring of the provisions available;
- Maintenance of any contracts with outside education and training providers.

- Ensuring that the Learning Plan is effectively implemented so that the JLC meets their goals and targets for learning provisions.

The parties agree that any learning needs analysis is undertaken with the full co-ordination of all parties, and that any such analysis will be solely for learning and educational purposes. The analysis will not be used in relation to other issues such as pay, performance appraisal, redundancy, disciplinary procedures etc.

The parties commit to regularly updating the learning needs analysis of participants in any learning programme.

The JLC will comprise of equal numbers of Employer and Union representatives and the employer will place at least one senior member of its management team on the joint JLC, so that the committee is then able to make effective decisions. All decisions taken will be communicated to the Joint Consultative and Negotiating Committee (JCNC) in a timely fashion.

The parties agree to ensure that all sectors of the workplace are represented equally on the joint JLC, and that members of the JLC are provided with all relevant information concerning the learning provision and their duties/responsibilities as members of the committee.

The parties will have the responsibility of disseminating all information on matters relating to learning in the workplace and will ensure that all employees and managers are made aware of the learning opportunities available and the work of the JLC.

The JLC will meet once a month (or as jointly agreed) to carry out the tasks as identified by this learning agreement.

A Chairperson and Secretary will be appointed at the first meeting of the JLC, and once a year thereafter, to facilitate the future meetings of the committee.

## Company Responsibilities

- To make a commitment to lifelong learning for all employees in (Organisation) and to the agreed policy;

- Demonstrate a commitment to the policy by supporting the Union Learning Representatives (ULR) in carrying out their duties, responsibilities and training within their role;
- Provide suitable resources to support lifelong learning and assist the ULR in their duties e.g. office space, filing cabinet, stationery, telephone, access to electronic equipment including email, fax, photocopier and to notice boards etc.

## Trade Union Responsibilities

- Demonstrate a commitment to lifelong learning and the policy;
- Provide relevant training for the development of Learning Representatives;
- Support, advise and guide the Union Learning Reps within (Organisation)
- Develop and support a network of ULRs

## Union Learning Representatives Responsibilities

- To promote the value of learning or training;
- To provide information and advice about learning or training that is available;
- To analyse learning and training needs that are not job specific;
- To assist members to access training and learning opportunities that are available.

## Union Learning Representatives Statutory Functions and Rights

- The Employment Act 2002 and the Employment (NI) Order 2003 gives statutory recognition to the ULRs and rights to time off. The key features of the law are:
  - ULRs will be entitled to reasonable time off for:
    - Analysing their members' learning or training needs;
    - Providing their members with information and advice about learning or training matters;

- Arranging learning or training for their members;
- Promoting the value of learning or training to their members;
- Consulting the employer about carrying out any of the above activities;
- Preparing to carry out any of the above activities;
- The ULR needs to be sufficiently trained to carry out his/her duties either at the time the employer is given notice of the appointment or within 6 months. They are entitled to reasonable paid time off training and to carry out their duties;
- Union members will have the right to time off to consult their ULR, and those members needing to access their ULR have the right to do this in work time.

**Equal Opportunities, Equal Access**

The parties recognise the importance of equal opportunities and equal access to enhance skill levels in order to meet both the business objectives of the employer as well as the individual learning and development needs of the employees.

The parties will ensure that training and development will be provided to all employees.

The Joint Learning Committee (JLC) will:

- Make every effort to ensure that when any learning takes place the specific needs of specific individual employees are taken into account;
- Ensure that Workplace Union Learning Reps are given the opportunity to take suitable training enabling them to offer support, advice and guidance to their members and work with the employer to introduce a learning culture into their workplace;
- Assist the individual employees/learning reps to make informed choices with regard to learning programmes, giving those concerned the ability to secure the maximum benefits possible from the opportunities available;
- The terms of this agreement will be reviewed by the committee at regular intervals to ensure that they continue to reflect the needs of the (Organisation).

Although participation by employees will be on a voluntary basis, the Unions agree to actively encourage their members to fully participate in all learning initiatives and opportunities.

Signature (NIPSA):

Date:

.....

Signature (Employer[s]):

Date:

**Note:** The terms used in this Model Agreement can be amended to reflect the terms used by specific employers and their negotiating forums.



# Learner Interview Form

## Learner's Details

<b>Name:</b>		<b>Tel:</b>	
<b>Branch/Office:</b>		<b>Membership No.:</b>	
<b>Gender:</b> Male    Female	<b>Grade:</b>		
<b>Business Unit/Region/Area:</b>			
<b>Contract:</b> Part Time    Full Time    Shift Worker    Temporary    Permanent    Other			

## Learning Needs or Interests Identified:

<p>Information Technology</p> <p>Continuing Professional Development</p> <p>Further Education    <i>GCSE</i>    <i>A Level</i>    <i>NVQ</i></p> <p>Higher Education    <i>Foundation</i>    <i>Degree</i>    <i>Postgraduate</i></p> <p>Foreign Language</p> <p>Learning for Fun</p> <p>Skills for Life    <i>ICT</i>    <i>Numeracy</i>    <i>Literacy</i></p> <p>English for Speakers of other languages (ESOL)</p> <p>Other .....</p>	<p><b>Qualifications</b> <i>(please list)</i></p>
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## Action Taken *(e.g. information offered or where referred to) and agree outcome.*

<b>Learner's Signature:</b>	<b>Date:</b>
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**Age Group:**    under 25    25 - 45    over 45

**Follow Up Date for Interview**

d	d	m	m	y	y
---	---	---	---	---	---



<p><b>3. Have you given members advice, guidance and information on learning?    Yes    No    How many?</b></p>												
<p><b>4. Were they referred to:    FE College    Open University    In-house    Other</b></p> <p><b>If 'other' please specify:</b></p>												
<p><b>5. Are any members undertaking other courses?    Yes    No    If 'yes', please complete the details below.</b></p>												
Name of Employer	Details of Course	Course Provider	Course Location	Start Date	End Date	Enrolment	Male (M)	Female (F)	Age 16-24	Age 24-45	Age 45+	Completions
<p><b>6. Have you completed any ILNS?    Yes    No    How many?</b></p>												

**7. Have you organised/held any awareness/learning events?**

**Yes    No    How many attended?**

**If 'yes', please specify more details:**

**8. Have you networked with other ULRs    Yes    No**

**If 'yes', please specify more details:**



**9. Please provide any other relevant information:**



## NIPSA Union Learning Committee Membership and Procedure for Election

1. The membership of the Committee shall comprise of 10 ordinary members, 2 members from the General Council, 2 members from the Civil Service Group Executive Committee and 2 members from the Public Officers' Group Executive Committee.
2. Subject to nominations having been received **4** of the **ordinary seats** on the Committee shall be held by union learning representatives from the **CS Group** area with a minimum of one seat allocated to a different department.
3. Subject to nominations having been received **4** of the **ordinary seats** on the Committee shall be held by union learning representatives from the **PO Group** area with a minimum of one seat allocated to each of the following sectors:

<b>Local Government</b>
<b>Housing</b>
<b>Education</b>
<b>Health and Social Care</b>

4. In the event of a shortfall in the take up of seats on the Committee from either Group, these shall be filled through the election process to ensure the 10 ordinary seats are filled.
5. Branches are invited to nominate **one** union learning representative from their own branch only to be elected to the Committee. Nominations should be made on Form 1b and returned to NIPSA Headquarters **by a specified date which will be notified to branches**.
6. A list of nominations received by the deadline will be issued to delegates in advance of the conference for information purposes only.
7. A ballot paper will be prepared for collection by each branch union learning representative(s) registered and in attendance at the conference.
8. Voting shall be on the basis of one vote for each branch union learning representative(s) registered and in attendance at the conference.
9. All branch union learning representatives who act in that capacity on behalf of a branch will be eligible to attend the Conference and will be entitled to vote in the election for the Union Learning Committee.





**NIPSA Learning Coordinator**

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**w: [www.tinyurl.com/niposa-learn](http://www.tinyurl.com/niposa-learn)**