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# EVALUATION OF THE WALES TUC LEARNING AND EDUCATION SERVICES 2010-2013

Title: Evaluation of the Wales TUC Learning and Education  
Services 2010-2013

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Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

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## Glossary

| Acronym | Definition   |
|---------|--|
| BECTU   | The Broadcasting, Entertainment, Cinematograph and Theatre Union               |
| FBU     | The Fire Brigades Union  |
| GMB     | National Union of General and Municipal Workers.                               |
| NOCN    | NOCN is the organisation preserving the heritage of the Open College Network   |
| OCN     | Open College Network   |
| PCS     | Public and Commercial Services Union   |
| TUC     | Trades Union Congress  |
| TUPE    | Transfer of Undertakings (Protection of Employment) Regulations 2006           |
| UCATT   | Union of Construction, Allied Trades and Technicians                           |
| UNISON  | Union representing members working in a range of public services and utilities |
| UNITE   | Union representing members working in a range sectors across the UK            |
| USDAW   | Union of Shop, Distributive and Allied Workers                                 |
| WULF    | Wales Union Learning Fund  |

## **1. Introduction**

### **About the Study**

- 1.1 ERS was awarded the contract to undertake an evaluation of the Wales TUC Learning Services and Education Services Business Plan 2010 - 2013. The overarching aim of this evaluation is to review the process and impact of the work undertaken by Wales TUC with the funding they receive from the Welsh Government and to assess the effectiveness of Wales TUC in achieving their objective of engaging employers and employees in learning activity.
- 1.2 The evaluation has a particular focus on determining the efficacy of the investment in terms of promoting lifelong learning (amongst both employees and employers), supporting unions in engaging their members (and others) in learning opportunities and brokering appropriate learning provision. It extended to assessing the role of all other types of Union Workplace Representatives, given that funding was utilised to fund training for these roles.

### **Structure of this Report**

- 1.3 In this report we firstly (in Section 2) present the methodology adopted in delivering this evaluation. We then (at Section 3) present an overview of the background to Wales TUC in relation to the activity funded by the Welsh Government. Section 4 covers the key recommendations emerging from the research.
- 1.4 Section 5 outlines the activity undertaken and impact in terms of the performance of Union Workplace Representatives. This covers the analysis from the representative survey, course content, approach to responding to atypical workers and the wider social impact of the activity. Section 6 reviews the activity and impact of essential skills support.
- 1.5 Section 7 covers the activity and impact of supporting Union Learning Representatives. This section also covers the workforce development strategies, learning agreements and the Networks of Excellence. The following part (Section 8) covers the support for WULF projects.

- 1.6 Section 9 assesses the wider delivery by Learning Services covering key objectives including the support for the WULF Programme, redundancy support, TUC Quality Award and Sector Skills Councils. Section 10 provides a commentary on alternative methods of delivery.
- 1.7 Section 11 includes the main conclusions in the form of findings and recommendations.



## **2. Methodology**

### **Approach**

- 2.1 Our evaluation involved a number of stages. This included:
- A detailed review of strategic and operational documentation;
  - Analysis of programme data;
  - Primary consultation with key stakeholders including 19 employers, 3 Welsh Government officials, 14 Wales TUC staff, 32 union staff operating across 21 unions (full list included in Appendix A); and
  - An online survey of Union Workplace Representatives.
- 2.2 The online survey was distributed to all Union Workplace Representatives across Wales (with an email address) to gather data about their experience of trade union education and learning. The survey gathered data from 479 separate Union Workplace Representatives covering: Union Learning Representatives; Union Equality Representatives; Union Green Representatives; Union Health and Safety Representatives; and Union Representatives. Interestingly almost a third of respondents (n=160) held multiple roles. Therefore we have data from individuals undertaking 639 separate roles.
- 2.3 It is difficult to accurately assess how representative the survey respondents were of the population of Union Workplace Representatives. Trade Union Education has no way of knowing the total number of representatives (except ULRs) in any category as this is information held by the unions. The survey was sent to those representatives who undertook the Wales TUC training (other than ULRs) as it is they who were able to comment on the Wales TUC education.
- 2.4 Overall, the 639 responses represented almost 16 per cent of the total number of the estimated 4,000 individual representatives who undertook training between April 2010 and March 2013. At the 95 per cent confidence level the margin of error is well within +/- 5 per cent. The margin of error increases for each Union Workplace Representative role, with Union Representatives, Health & Safety Representatives and ULRs all being within +/- 10 per cent.

## **Limitations of Research**

- 2.5 In delivering this evaluation we have encountered a number of methodological challenges. The period of activity being evaluated, from April 2010 to March 2013, was between 3 and 5 years ago. This has proved testing in terms of stakeholder recollection of activity.
- 2.6 Research tools were designed to include regular reference to the time period being evaluated, to mitigate this. In addition, many of the stakeholders are no longer employed at the same organisation so we have been unable to involve them in this research. This includes, for example, representatives of the Sector Skills Councils.
- 2.7 The activity delivered by Wales TUC, particularly by Learning Services, has been broad in terms of the scale and scope, covering both strategic and operational activity. This is reflected in the 9 distinct, albeit overlapping, objectives.
- 2.8 Learning Services objectives and the requirement for the activity to be responsive to individual unions demands, very often on an individual workplace or union basis meant that the activity was often small scale, widely diverse parcels of support. This presented a challenge (in terms of the time required from the evaluation team) in assessing, on a cumulative basis, what the overall impact has been and whether resources were deployed in the most effective way.
- 2.9 Our original intention at the outset was to consult, via a detailed survey, with employers and learners (i.e. those employees supported into learning by Union Learning Representatives) across Wales to gather the necessary data enabling us to respond to each objective of the evaluation brief. We were restricted from doing this on the basis of reservations from Wales TUC about the impact this could have on union and workplace relations. In the end we were restricted to consulting with a relatively small number of employers and no learners. This has limited somewhat our ability to triangulate the data and present definitive conclusions across a number of the key evaluation questions.
- 2.10 Overall we undertook interviews with representatives from 21 separate unions with staff operating in various roles, including General Secretary, Education Officer, WULF Project Manager and Full-time Officer. This has provided valuable qualitative data on how the services being evaluated were delivered, wider conditions that influenced delivery and the subsequent impact.

- 2.11 However, the complexity of the programme in terms of the diversity of the strands of delivery has meant that often stakeholders consulted were only in a position to comment on particular strands of activity related to their role.
- 2.12 The evaluation has achieved quantitative and in-depth qualitative data from the direct users of Learning Services and Education services i.e. the Union Workplace Representatives, Unions, wider stakeholders, and to some extent the employer voice in the context of 19 employer interviews. From the data gathered we have been able to comment on the value of the outputs and to some extent the outcomes achieved for those stakeholders. However, a comprehensive evaluation of impact would have required wider access to employers and individual employee/learner records.

### **3. About Wales TUC**

#### **The Agreed Business Case 2010-13**

- 3.1 Wales TUC works to add value to workplace learning in Wales by utilising the capacity of trade unions to engage and support workers across unionised workplaces in learning. There are three strands to the Wales TUC's learning agenda:
- Promoting lifelong learning, supporting unions in engaging their members in learning opportunities and in brokering appropriate learning provision. This learning strand is pursued by the Wales TUC Learning Services team.
  - Developing the skills of union workplace representatives (including union representatives, health and safety representatives, union learning representatives and increasingly equality representatives) and providing appropriate accredited training through providers of Further Education across Wales.
  - Providing and managing Networks of Excellence to support union learning representatives and WULF project managers on a regional basis to assist them in gaining value for money learning and quality provision. This learning strand is pursued by Wales TUC Education Services team.
- 3.2 The overarching strategic framework which governed the activities of Wales TUC Learning Services during the evaluation period 2010 -2013 was laid out in the three year Business Plan agreed with Welsh Government 'Brighter Future for Workers, A Brighter Future for Wales 2010 – 2013', delivered with £2.4m Welsh Government funding.
- 3.3 The initial ideas for the priorities were harvested from consultation internally within Wales TUC. This ensured that staff involved at the coalface of delivery were able to contribute to identifying future funded priorities. Following this exercise a draft plan was discussed with the Wales TUC General Secretary and unions to agree priorities further to detailed discussion with the Welsh Government as to how the funding was to be targeted.
- 3.4 The Business Case was delivered by two distinct teams within Wales TUC, Education Services and Learning Services, and they each had distinct roles in delivering the Business Plan 2010-13.

**Table 3.1: Business Case Aims and Objectives**

| Learning Services   | Education Services  |
|---|---|
| Business Case Aims  |   |
| <ul style="list-style-type: none"> <li>• To raise the levels of skills in the workforce, aimed at enabling members to obtain good quality, well paid jobs;</li> <li>• To develop the capacity of unions to deliver quality learning strategies;</li> <li>• To work with Welsh Assembly Government and key stakeholders to implement key strategies relating to skills and lifelong learning</li> <li>• To improve the quality of Union Learning activity by drawing on good practice and research</li> </ul>  | <ul style="list-style-type: none"> <li>• Improvements in the performance of union representatives at the workplace and in the union</li> <li>• Greater understanding of trade union policies and priorities.</li> <li>• Enhanced study skills and personal confidence for all those who take part.</li> <li>• Recognition of learning achievements through accreditation</li> <li>• Personal satisfaction and enrichment through learning.</li> </ul> |
| Business Case Objectives  |   |
| <ul style="list-style-type: none"> <li>• Strategic Development;</li> <li>• Support for the WULF Programme;</li> <li>• Recruitment, Support and development of Union Learning Representatives;</li> <li>• Basic Skills Learning;</li> <li>• Working with Sector Skills Councils;</li> <li>• Partner and stakeholder engagement;</li> <li>• Supporting the development of workforce learning strategies and Learning Agreements;</li> <li>• Supporting redundant workers in accessing learning and skills;</li> <li>• Monitoring, evaluation and evidence.</li> </ul> | <ul style="list-style-type: none"> <li>• Improve the performance of union representatives at the workplace and in the role within the union</li> <li>• Course Materials</li> <li>• Networks of Excellence</li> <li>• Wales TUC Quality Award</li> <li>• Working with atypical workers.</li> <li>• Value of Trade Union Education</li> </ul>   |

- 3.5 In line with reductions and funding constraints, a 2 per cent budget reduction, between the original plan for 2010-13 and the final plan, was actioned. Based on the previous working relationship there was a high degree of confidence on the part of the Welsh Government that Wales TUC would be able to deliver the business plan.
- 3.6 Table 3.2 below outlines the staffing structure resourced to deliver the contract.

**Table 3.2: Programme Staffing Structure**

| Learning Services  | Education Services  |
|--|---|
| <ul style="list-style-type: none"> <li>• Head of Learning Services;</li> <li>• Development Officers (Three FT Positions, Two 28 Hour per week positions);</li> <li>• Project Workers (Two FT Positions);</li> <li>• Essential Skills Workers (One FT Position, One 28 Hour per week positions); and</li> <li>• Administrative Support Worker.</li> </ul> | <ul style="list-style-type: none"> <li>• Head of Education Services (50 per cent funded by TUC, 50 per cent via the Welsh Government contract);</li> <li>• Project Officer (100 per cent funded by TUC)</li> <li>• Networks of Excellence &amp; TUC Quality Award Officer</li> <li>• Administrative Support Worker</li> </ul> |

Source: Wales TUC

- 3.7 It is evident from Table 3.2 that the Welsh Government benefit from time in kind provided by Wales TUC. Without such an arrangement it is estimated that the annual cost of delivering the Education Services strand of the Business Case would be in the region of 20 per cent higher due to these additional staff costs.

#### *Learning Services Expenditure*

- 3.8 Table 3.3 shows the expenditure across the relevant sub-budget headings. The overall spend for Learning Services over the duration of the contract was in the region of £1.434m. The majority of the funding (almost 85 per cent) was utilised to pay staff salaries for the Learning Services team. In addition, Learning Services ran the Essential Skills project (2010 - 2013) that employed 2 staff funded by Welsh Government as part of their larger European funded programme.

**Table 3.3: Learning Services Expenditure 2010-13**

| <b>Budget Heading</b> | <b>Expenditure</b> |                 |                 |                   |
|-----------------------|--------------------|-----------------|-----------------|-------------------|
|                       | <b>2010/11</b>     | <b>2011/12</b>  | <b>2012/13</b>  | <b>Total</b>      |
| Events                | £7,933             | £19,734         | £20,691         | £48,358           |
| Promotional Material  | £2,000             | £3,189          | £21,136         | £26,325           |
| Staff                 | £402,324           | £410,063        | £403,287        | £1,215,674        |
| Expenses and Travel   | £48,132            | £46,385         | £42,005         | £136,522          |
| Equipment             | £917               | £1,487          | £5,119          | £7,523            |
| <b>Total</b>          | <b>£461,304</b>    | <b>£480,858</b> | <b>£492,239</b> | <b>£1,434,401</b> |

Source: Wales TUC

*Education Services Expenditure*

- 3.9 The overall spend for Education Services over the duration of the contract was £882,150. Table 3.4 shows the spend across the relevant sub-budget headings. The majority of the funding was utilised to fund course provision and pay staff salaries for the Education Services team.

**Table 3.4: Education Services Expenditure 2010-13**

| <b>Budget Heading</b>   | <b>Expenditure</b> |                 |                 |                 |
|-------------------------|--------------------|-----------------|-----------------|-----------------|
|                         | <b>2010/11</b>     | <b>2011/12</b>  | <b>2012/13</b>  | <b>Total</b>    |
| Course Fees             | £129,000           | £143,000        | £140,000        | £412,000        |
| Centre Course Promotion | £6,000             | £6,000          | £6,000          | £18,000         |
| Course Development      | £10,000            | £3,000          | £3,000          | £16,000         |
| Events                  | £9,000             | £9,000          | £10,000         | £28,000         |
| Promotional Material    | £8,000             | £6,500          | £7,000          | £21,500         |
| Research                | -                  | £3,000          | £3,000          | £6,000          |
| Equipment               | £500               | £2,000          | £1,000          | £3,500          |
| Staff                   | £103,891           | £107,395        | £110,617        | £321,903        |
| Expenses and Travel     | £10,000            | £10,000         | £10,500         | £30,500         |
| Redundancy/Contingency  | £8,249             | £8,249          | £8,249          | £24,747         |
| <b>Total</b>            | <b>£284,640</b>    | <b>£298,144</b> | <b>£299,366</b> | <b>£882,150</b> |

Source: Wales TUC

### *Output Targets and Achievements*

- 3.10 In each of the annual Operating Plans a number of output targets were set to measure progress on a quarterly basis. Table 3.5 below set out these targets and the progress made towards meeting them.

**Table 3.5: Wales TUC Output Achievement**

|  | <b>Output Target<br/>2010-13</b> | <b>Output Achieved<br/>2010-13</b> |
|--|----------------------------------|------------------------------------|
| Union Workplace Representatives trained                | 6,600                            | 8,320                              |
| Number of ULRs recruited                               | 300                              | 385                                |
| Learning Agreements Signed and/or updated (workplaces) | 180                              | 696                                |
| Learning committees established (workplaces)           | 45                               | 307                                |
| Workforce Development Strategies (workplaces)          | 140                              | 356                                |

Source: Wales TUC Annual Reports 2011 to 2013

- 3.11 Each output target was met, many by a significant margin. It is however important to stress that whilst this is a positive indication of delivery, it is the assessment of the outcomes and impacts of the work delivered through the contract that is of greater interest.



## 4. Findings

This evaluation has identified 11 main recommendations as listed below.

**Recommendation 1:** Wales TUC review the online survey data to consider where specific improvements could be made. Survey data could also be used as a broad benchmark against which to compare future performance.

**Recommendation 2:** In any future contract there should be an increased emphasis, and performance measure, on how the representatives support the delivery of agreed outcomes in the workplace. It is important to gain the perspective of employers as to the added value gained from such an approach, so this should be incorporated into any new performance management regime.

**Recommendation 3:** The Welsh Government should consider including the delivery of any essential skills delivery programme into any wider contracts to be delivered by Wales TUC.

**Recommendation 4:** In future contracts consideration should be given to continuing the resource to widen support networks for trained ULRs.

**Recommendation 5:** In future contracts consideration should be given to reviewing how wider support networks for Green and Equality Representatives could be resourced and delivered.

**Recommendation 6:** In future contracts consideration should be given to the collection of data that clearly informs the impact of distinct activities. This could include a short questionnaire to all employers and unions on the activity and impact of each learning agreement developed, WULF project supported, etc.

**Recommendation 7:** It is recommended that the Welsh Government fully consider the issues around facility time prior to commissioning future union learning programmes to ensure that good value for money is achieved.

**Recommendation 8:** It is recommended that the Welsh Government consider in detail the future support requirements for WULF projects that should be delivered by Wales TUC.

**Recommendation 9:** In any future commissioning decisions consideration should be given to commissioning a single comprehensive programme of activity rather than separate silos of services.

**Recommendation 10:** The Welsh Government and Wales TUC should consider the development of an appropriate evaluation framework and make available the necessary resources to implement this. The resources required to deliver this needs to be commensurate with the scale and risk of the programme.

**Recommendation 11:** The Welsh Government should continue to recognise Wales TUC as the organisation to deliver similar single contracts in the future.

## 5. Improving the Performance of Union Workplace Representatives

### Context

5.1 This section of the report assesses the impact of Wales TUC facilitating provision of trade union Education courses to equip Union Workplace Representatives with the knowledge and skills to deliver the role. This section also considers:

- Appropriateness of course content and delivery, including the approach to learning provision for atypical workers; and
- The wider social impact of the training undertaken by Union Workplace Representatives during 2010-13.

### Scale of Delivery

5.2 Included in Table 5.1 is a summary of the headline figures from Education Services annual course statistics for each year 2010-2013. These are based on the calendar year due to the reporting process of Education Services.

**Table 5.1: Union Workforce Representatives Trained in Wales**

|  | 2010* | 2011  | 2012  | 2013** | Total |
|--|-------|-------|-------|--------|-------|
| <b>Number of workplace reps trained</b>              | 2,354 | 2,637 | 2,646 | 683    | 8,320 |
| <b>Number of union professional officers trained</b> | 47    | 26    | 37    | 12     | 122   |

Source: Wales TUC

\*2010 figures are based on 75 per cent of the calendar year total to reflect delivery Apr-Dec 2010. \*\*2013 figures are based on 25 per cent of the calendar year total to reflect delivery Jan-Mar 2013 delivery

5.3 The annual target for training Union Workplace Representatives was 2,200 across the 2010-13 period, a target comfortably achieved. In addition many more individuals have benefitted from funded activity. For example, within the 2011-2012 period a further 600 representatives had attended events, briefings and seminars organised by Wales TUC or in which they delivered training sessions.

- 5.4 Figure 5.2 compares the difference in Union Workplace Representatives trained in Wales and the wider UK in 2010 and 2013.

**Table 5.2: Union Workforce Representatives Trained in UK and Wales**

|                 | 2010   | 2013   | Variance       |
|-----------------|--------|--------|----------------|
| <b>Wales</b>    | 3,139  | 2,734  | -12.9 per cent |
| <b>Wider UK</b> | 54,024 | 41,022 | -24.1 per cent |

Source: Wales TUC and Unionlearn

- 5.5 Across Wales and the wider UK there was an overall reduction in 2013 in the number of Union Workforce representatives attending training sessions compared to 2010. We know that the recession had a direct negative impact on the demand for union Education training. However, the scale of the reduction was less severe in Wales than the rest of the UK.
- 5.6 The figures show that had the reduction in training demand in Wales reflected the wider UK picture then 351 fewer Union Workplace Representatives would have been trained in 2013 in Wales. Over the duration of the three year programme it is estimated that approximately 1,000 fewer Union Workforce Representatives would have been trained had the picture in Wales reflected the wider UK learner reduction rate.

### **Course Design and Accreditation**

- 5.7 Most of the Wales TUC provision was accredited by Agored Cymru. Courses were accredited from OCN Level 1 – 3, with the majority of provision being accredited at level 1 or 2. The Wales TUC Trade Union Education Programme and course units are part of a TUC, UK wide, NOCN, standardised representative training programme. All units are listed in the TUC'S Passport to Progress Document and, we believe from information provided via Wales TUC, that no other organisation in Wales could deliver these units without the permission of the Wales TUC.
- 5.8 This is clearly an issue to be considered by the Welsh Government moving forward should consideration be given in the future to competitively tendering the contract.

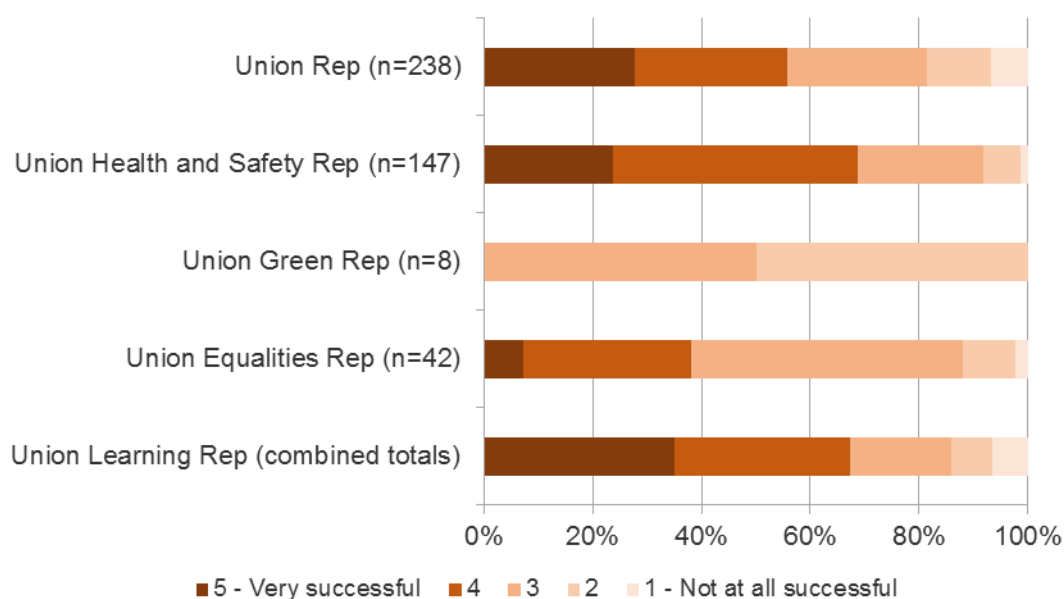
- 5.9 On an annual basis a course programme brochure was produced and distributed to union contacts, previous students and affiliates. In addition to the courses listed in the brochure additional ad hoc short courses were delivered to meet the particular training needs of Education Service the 52 TUC affiliated unions along with additional courses delivered in collaboration with partners.
- 5.10 The course programme was delivered by two providers, Coleg Gwent in south east Wales and WEA Cymru across south Wales and north Wales. Bridgend College was an additional provider but unexpectedly ceased operations early in the programme. While some disruption was experienced partners worked collaboratively to minimise impact on learners across the whole of Wales
- 5.11 The Course Coordinator at each provider worked closely with Wales TUC to work towards the successful delivery of the Education Programme on a day to day basis. Courses were not only delivered in the Coleg Gwent or the WEA premises but also within workplaces, union offices and other locations.
- 5.12 A common issue with the provision of courses is achieving the required number of learners to make the course viable. It can be frustrating for learners to agree time away from work only to find that the course has been cancelled or rescheduled due to lack of numbers. Our research with Wales TUC, Course Coordinators and Agored Cymru revealed that the approach adopted by Wales TUC was to fund providers to deliver training courses that had less than the accepted minimum number of learners. On the basis of this research we believe that this approach was important in ensuring learners progressed through courses at the rate achieved.
- 5.13 Learners attending the 'core course programme' undertook training alongside others from a variety of unions and different workplaces. Our research has identified strong support from learners and many unions for this multi union programme.
- 5.14 In addition to the multi union programme, Education Services also delivered courses to single unions that included the same skills content but were contextualised for a particular union and the workplaces/sectors represented. During 2010-13 single union programmes were delivered on behalf of the following unions UNITE, UNISON, PCS, USDAW and the GMB.

- 5.15 Information was also provided for progression pathways, support for redundancy and retraining, online learning and Networks of Excellence. The 2011-12 and 2012-13 brochures were distributed via the Networks of Excellence and available for download from the Wales TUC website. Brochures were distributed to existing Union Workplace Representatives and at other events, such as the Professional Officers annual conference. Our research with unions, covered fully in Section 7, has found that there publicity and marketing of opportunities was largely effective.
- 5.16 Further new course development took place over this period, including the development of the Leading Change Programme and Equality Module for ULRs. Our research has revealed that during the period 2010-13 Education Services added real value in terms of the equality agenda through the Union Equality courses that were designed and delivered. This was especially important given the unique equality policy of the Welsh Government. Simply following the standard UK wide union learning approach would not have been appropriate. Education Services were widely regarded by TUC Unionlean and unions as being 'ahead of the game' in this regard.

### **Influence of Training in Delivering the Union Workforce Representative Role**

- 5.17 This section explores the support and training the Union Workplace Representatives received through Education Services programmes. It also examines the benefits representatives generated for employees and employers.
- 5.18 The number of survey returns from Green Union representatives was very low. We have included the data in the relevant charts but have not provided any commentary or drawn any specific conclusions due to the small numbers involved.
- 5.19 Analysis of the Union Workforce Representative survey highlighted how successful representatives felt they were in delivering their respective role, as represented in Figure 5.1.

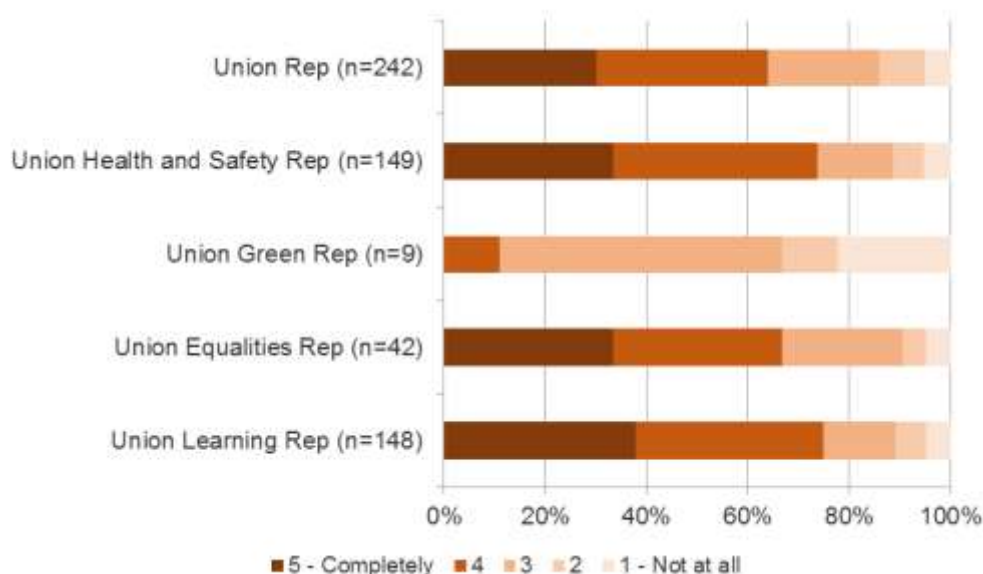
**Figure 5.1 – Success of Union Workplace Representatives in Delivering the Role (n=479)**



Source: ERS Union Workplace Representative Survey 2015

- 5.20 The findings illustrate that ULRs and Union Representatives were most confident of their success in undertaking their role. In fact, more than 35 per cent ULRs felt they had been 'very successful' in their role. In contrast, only 7 per cent of Union Equality Representatives considered they were very successful in delivering the role.
- 5.21 However, a further 31 per cent of Union Equality Representatives responded with a rating of 4 on the likert scale, which illustrates a certain level of confidence in their perceived success.
- 5.22 The survey covered how Union Workplace Representatives felt the training and support received from Wales TUC during the period April 2010 to March 2013 contributed towards delivery of their role. Details are shown in Figure 5.2.

**Figure 5.2 – The extent training and support received between April 2010 and March 2013 from Wales TUC contributed to Union Workplace Representative delivering their role (n=590)**



Source: ERS Union Workplace Representative Survey 2015

- 5.23 For each of the different groups of representative (other than Union Green Reps data that has not been considered given the low number of respondents), the majority of representatives were very positive towards the training and support received from Wales TUC. Over 30 per cent of Union Health and Safety Representatives, Union Equality Representatives and ULRs felt they were completely supported by the Wales TUC to deliver their role.
- 5.24 Overall 69 per cent of the total representatives believed that the training and support received contributed significantly (rated as either a 4 or 5 on the likert scale) to them being able to deliver their respective union role. For those trained for the first time between April 2010 and March 2013 the figure was 72 per cent.
- 5.25 We regard this as particularly positive and reflective of the quality of training and ongoing support post-training. For those first trained in their role prior to April 2010, 65 per cent believed the training and support received contributed significantly to their ability to deliver their union role.



- 5.26 Additional comments captured through the survey demonstrate the positive difference training and support from Wales TUC made to Union Workplace Representatives, particularly in improving their levels of confidence and skills to undertake their respective role:

“The advice and support that I have received from the Wales TUC Learning Development Officers has been invaluable” (Union Learning Rep)

“I genuinely believe the training and support has been excellent with the TUC. They are always helpful and ready to assist my enquiries/needs as a ULR”

“It was very good training, without it I couldn't do my role” (as a Health & Safety Representative)

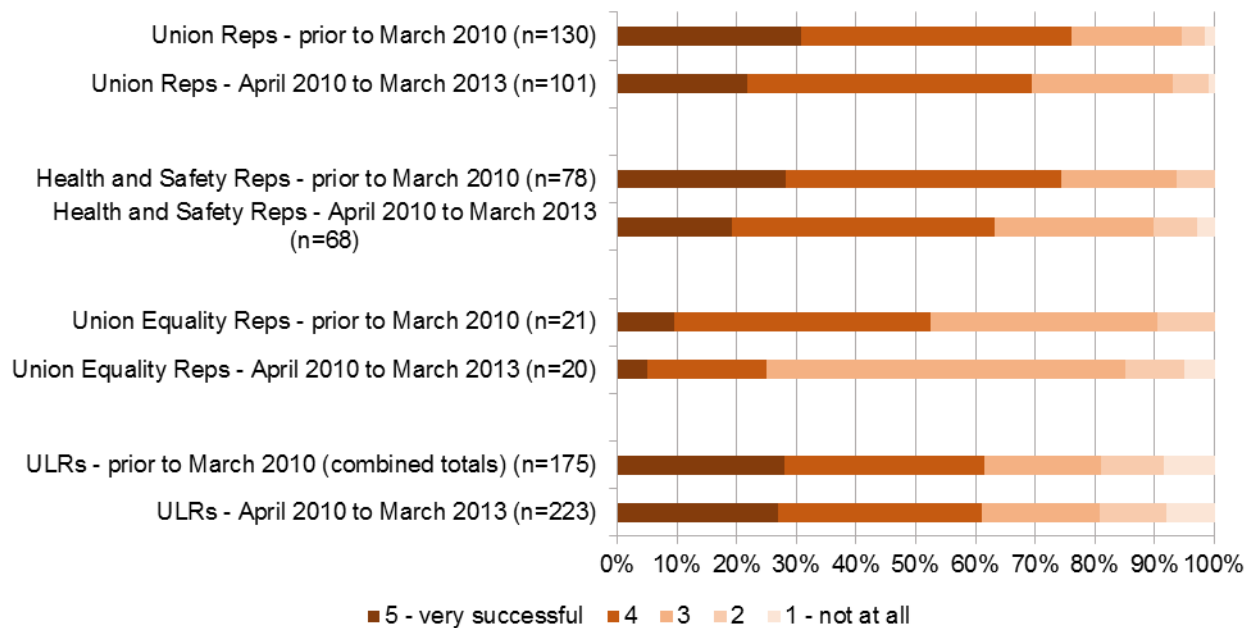
“The training was career altering, as I developed into professional Health & Safety Advisor”

“Due to the training, I have gained confidence to be strong and not be influenced by production issues. Instead I put health and safety first and explain to the employees I work with, that you must keep safe and work safe. I find people are being more proactive in working with health and safety to produce our products on time, safely”

“Excellent range of specialist courses as well as the longer initial training courses. I did a Diploma in Employment Law which has proved to be extremely useful to me (as a Union Representative)”

- 5.27 We know from our stakeholder research that the needs for the different type of Union Workplace Representative vary from workplace to workplace. For example, ULRs employed in workplaces where continued professional learning is required as part of the employees role or where there is a greater propensity of professional workers has a less important role or function than workplaces where the opposite is true.
- 5.28 In total, 52 per cent of all representatives responding to the survey first began training in their Union Workplace Representative role between April 2010 and March 2013, whereas 48 per cent undertook training prior to March 2010. Figure 5.3 shows the difference in perceived impact for those Union Workplace Representatives, across roles, who received their first training post April 2010 compared to pre April 2010.

**Figure 5.3 – Success of Union Workplace Representatives in their role: The differences between Union Workforce Representatives who first commenced training pre and post April 2010 (n=479)**



Source: ERS Union Workplace Representative Survey 2015

- 5.29 In terms of how successful representatives believed they have been in their role, there was a slight difference between those representatives that first commenced their training between April 2010 and March 2013 and those that first commenced training prior to March 2010. More than 30 per cent felt they had been very successful in their role, while just over 20 per cent of those commencing training from April 2010 to March 2013 stated this was the case. This aligns with our wider research that indicated that experience in the role is a factor in perceived success.
- 5.30 Further to this, for Union Equality Representatives that commenced training prior to March 2010, just over half felt they had been successful in their role (responding with 4 or 5 on the likert scale), while around a quarter of commencing training more recently from April 2010 to March 2013 responded in the same way. Therefore representatives that had been performing the role longer were more successful in the role. However, there was marginal difference in responses between ULRs that commenced training prior to March 2010 or April 2010 and 2013, with over 6 in 10 feeling they had been successful in their role (responding with 4 or 5 on the scale).

- 5.31 Our wider research has identified that experience is a less important factor than a number of other Union Workplace Representative roles. We also know from research with unions and the Union Workplace Representatives that the wider support networks delivered through the contract by Wales TUC were well regarded. The evidence indicates that this has certainly contributed towards ULRs performance. This is covered more fully in Section 7 of this report.

### **Impact on the Employees**

- 5.32 Included below are key findings from the survey of Workplace Union Representatives in relation to their perceived impact on employees.

#### *ULRs*

- 91 per cent believed they had contributed towards increasing employee interest in undertaking additional qualifications (52 per cent to a great extent)
- 90per cent believed they had contributed towards increasing employee interest in further learning (66 per cent to a great extent)
- 79per cent believed they had contributed to improving employees promotion prospects (37 per cent to a great extent)
- 93 per cent believed they had contributed towards improving morale in the workplace (62 per cent to a great extent)
- 92 per cent believed they had contributed towards improving employees performance (61per cent to a great extent)

#### *Equality Reps*

- 87 per cent believed they contributed towards improved morale in the workplace (46 per cent believed to a great extent)
- 94 per cent believed they contributed towards providing employees with advice and guidance (68 per cent to a great extent)
- 96 per cent believed they increased awareness of equality issues in the workplace (64 per cent to a great extent)

#### *Health and Safety Reps*

- 96 per cent believed they had raised awareness of health, safety and welfare issues in the workplace (65 per cent believed to a great extent)
- 91 per cent believed they had contributed towards a safer working environment (65 per cent to a great extent)

#### *Union Reps*

- 84 per cent had significantly supported employees in terms of being a source of support
- 86 per cent had significantly supported employees in terms of being a source of information
- 81 per cent had significantly supported employees by finding solutions to personnel related issues

- 5.33 Overall the findings above are largely positive in terms of the impact on employees. The data above can also be used as a broad benchmark for future evaluations, taking into account the limitations of confidence intervals associated with the data.
- 5.34 There were variations in the responses from those ULRs that first commenced their training between April 2010 and March 2013, and the ULRs that commenced their training prior to 2010. For those ULRs trained for the first time between April 2010 and March 2013, 67 per cent of respondents felt they made a significant difference to employee morale whereas for ULRs trained for the first time prior to April 2010, this figure was only 54 per cent. By contrast, for those ULRs trained for the first time prior to April 2010, 88 per cent felt they made a positive difference for employees promotion prospects, while 80 per cent of ULRs trained for the first time between April 2010 and March 2013 responded in this way.
- 5.35 Our wider research with unions reinforced the positive perception from ULRs as to the positive impact the ULRs had on employees. A selection of typical responses is included below.

“Individuals feel they can talk openly with ULRs about particular issues beyond learning and education, building up a strong relationship of trust. Without the ULRs particular individual wouldn't have been engaged with”

“The role of ULRs has enabled us to reach disadvantaged and disillusioned members of the workforce identified as hard to reach. The project has provided us with a far greater reach in supporting essential English and maths requirements. This learning wouldn't have happened otherwise”

## Impact upon the Employer

- 5.36 The survey of Union Workplace Representatives covered the perceived impact their activities made to their employer. The findings are summarised below:

### *ULRs*

- 54 per cent believed they had aided staff recruitment (10 per cent believed to a great extent)
- 68 per cent believed they had aided staff retention (19 per cent believed to a great extent)
- 76 per cent believed they had aided productivity (17 per cent believed to a great extent)

### *Union Equality Reps*

- 91 per cent believed they had increased awareness of equality legislation and good practice (54 per cent to a great extent)
- 57 per cent believed they had aided staff recruitment (16 per cent believed to a great extent)
- 68 per cent believed they had aided staff retention (19 per cent believed to a great extent)
- 56 per cent believed they had aided productivity (14 per cent believed to a great extent)

### *Union Health & Safety Reps*

- 95 per cent believed they had raised awareness of health, safety and welfare issues in the workplace (61 per cent believed to a great extent)
- 90 per cent believed they had contributed to reducing accidents and near misses (41 per cent to a great extent)
- 75 per cent believed they had contributed towards reducing staff absenteeism (17 per cent to a great extent)
- 64 per cent believed they had aided productivity (47 per cent believed to a great extent)

- 5.37 Once again, we have not commented upon the Union Green Representative data due to the small number of survey responses.
- 5.38 For ULRs the positive reporting on employer impact was lower than the perceived impact upon employees. This is not too surprising given that employees are the immediate clients for ULRs, and they witness the changes and impact of their support. The wider impact on employers,

in terms of increased staff retention, etc. cannot be so easily witnessed by ULRs.

- 5.39 In the survey we did not ask Union Representatives to rate their perceived impact on set factors, but asked representatives themselves to self-identify areas where they had had an impact. A summary of responses is included below:

“As a senior union representative I have regular contact with senior management within the department and know how highly they appreciate what ULR's can and have done for their staff”

“Highlighting Health and Safety issues, and in my department resolving problems”

“We work together to resolve any issues, the confidence I gained through the courses has installed this in me”

“We have helped facilitate change by making practical requests to alter intended rough unilateral changes. We have campaigned as a union for changes in law and policy from which the company and wider society has benefitted”

“The manager for my area always discusses issues with me and appreciates my views and input on issues that may affect my colleagues in the workplace”

### **The Views of Employers and Unions on the Impact of Union Workplace Representatives**

- 5.40 As mentioned previously our initial plan on the commissioning of this study was to undertake a wider survey of employers to gather data on their perceptions of how, and to what degree, Union Workplace Representatives had supported employees and wider workplace during 2010-13. Due to factors explained earlier in this report we were unable to undertake such a survey. This has hampered the ability to effectively triangulate the data from the survey of Union Workplace Representatives.
- 5.41 We did however undertake one to one telephone interviews with 19 employers. Whilst employers interviewed were generally aware of the different Union Workplace Representative roles there was an overall gap in knowledge about the impact that particular Union Workplace Representatives (i.e. ULRs, Equalities, etc.) had had upon employees and the workplace more generally.

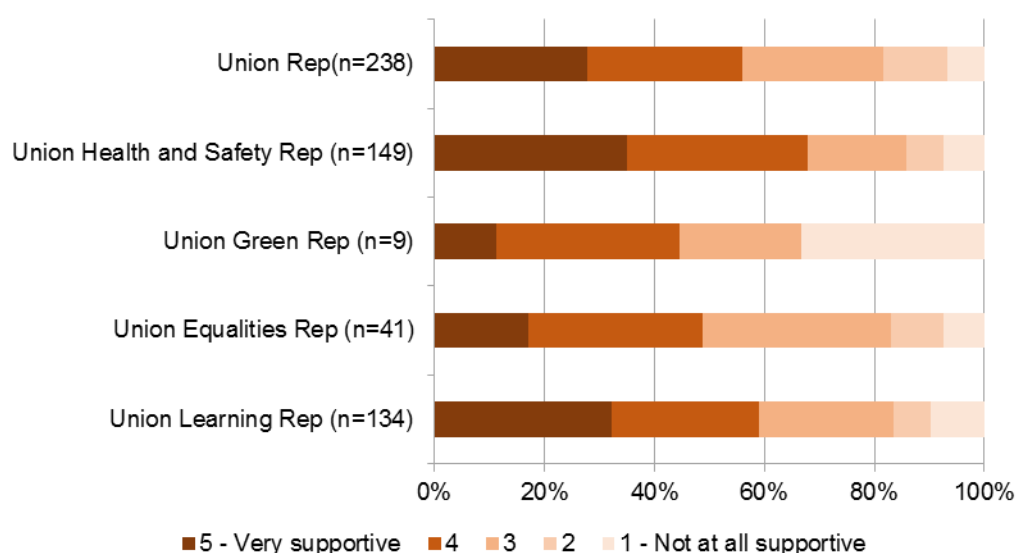
- 5.42 This, in part, was due to the coverage of the representatives in each workplace and the exposure of the employer to each type of representative.
- 5.43 Most of the union staff interviewed believed that employers were generally supportive of ULRs, although there was acknowledgement that some employers were significantly less supportive of the role and approach.
- 5.44 On the basis of interviews with unions, there is evidence to indicate that ULRs had a positive impact, albeit small, in terms of aiding staff retention. Our research identified that this view reflected that the period 2010-13 was challenging for many employers due to the recession and the high turnover of staff during this period made it difficult to accurately assess the impact of ULRs.
- 5.45 The views of union staff varied considerably in terms of the impact the activities of ULRs had upon aiding employers with staff recruitment. Many unions were simply unsure, in part due to the low levels of recruitment since 2010 across workplaces. Only a minority of those unions consulted cited that it was attractive to potential employees if they are made aware at the interview stage of opportunities to improve their skills.
- 5.46 Our research with union staff revealed that awareness of the Union Equality Representative role, in terms of impact in the workplace, was less well known than other roles, such as ULRs and Workplace Representatives. The point was raised by a minority of the unions interviewed that some employers remain unsure on the nature of the role, with a perceived cross over between the role and that of the traditional Union Representative that are involved in supporting the equality rights of employees and challenging issues of discrimination.
- 5.47 The union staff consulted had very low awareness of the role and impact of Union Green Representatives. To some degree this reflects the scale of coverage, with significantly fewer Green Representatives across Wales than other roles. We are unable to draw any data from this.
- 5.48 There was much wider awareness of the role and impact of the Union Health and Safety Representative role. Overall union staff were very positive in terms of how the training and support provided by Wales TUC between April 2010 and March 2013 has contributed towards representatives being able to deliver the Union Health & Safety role.

- 5.49 The majority of union staff interviewed recognised that Union Health & Safety Representative activities had made a significant contribution towards a safer working environment and more widely in benefitting employees through raised awareness of health, safety and welfare issues in the workplace. This aligned with the views of the representatives, as shown previously in Figure 5.1.
- 5.50 Those union staff that understood the role of the traditional Union Representative were very supportive of the role in terms of support for employees. Awareness of this role, unsurprisingly, was high.

### **Support from Employer to Deliver the Union Workplace Representative Role**

- 5.51 A key theme emerging from consultation with unions, and to a lesser extent employers, was the importance of the employer in enabling the Union Workplace Representatives to deliver role. In the survey Union Workplace Representatives were asked specifically whether they felt their employer was supportive to them in their union role. Findings are represented in Figure 5.4.

**Figure 5.4 – Are employers supportive to the Union Workplace Representative role? (n=479)**



Source: ERS Union Workplace Representative Survey 2015

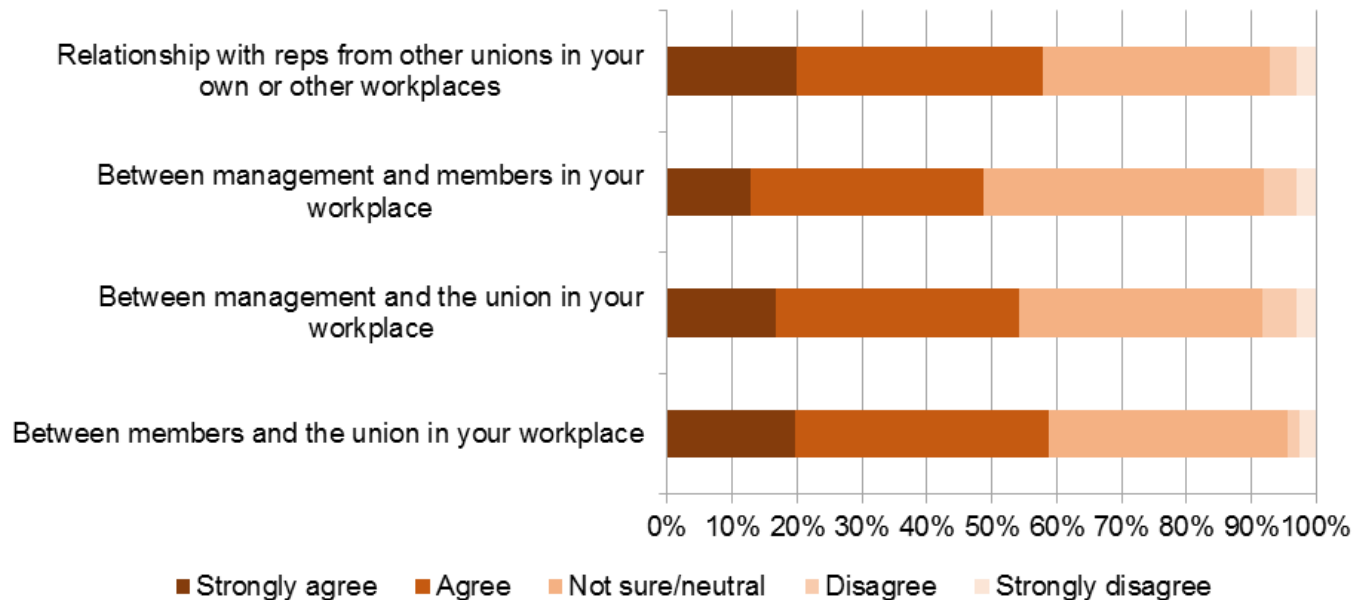


- 5.52 Overall employers were most supportive of the Health & Safety and the Union Learning Representative roles.
- 5.53 In total 69 per cent of Union Learning Representatives with a Learning Agreement in place felt their employer had been supportive to them in their role (responding with 4 or 5 on the likert point scale), and, of these, 35 per cent felt their employer had been very supportive.
- 5.54 In contrast, only 43 per cent of representatives without a Learning Agreement (or unsure whether an agreement was in place) felt their employer had been supportive to them. Of these, 26 per cent felt their employer had not been supportive or not been supportive at all (responding with 1 or 2 on the likert scale).
- 5.55 A number of comments from Union Workplace Representatives reflected the challenges they faced in their role, which particularly stemmed from a lack of support from employers:
- “It’s my personal opinion my manager and head of service have no interest in learning and development which makes it impossible for me to perform my ULR role”

“My employer would much prefer for me not to be active!!” (Union Rep)

“Sadly my role has had a negative impact on my career and I have been shunned for promotion and product training as a result” (Union Rep)
- 5.56 Consideration of reported issues of employer restrictions on ULR activity is covered more fully in Section 6.
- 5.57 Union Workplace Representatives also indicated how undertaking Wales TUC courses helped them improve working relationships with the following groups. Findings are presented in Figure 5.5.

**Figure 5.5 - Has doing any TUC courses between April 2010 and March 2013 helped Union Workplace Representatives improve their working relationships with any of the following groups? (n=337)**



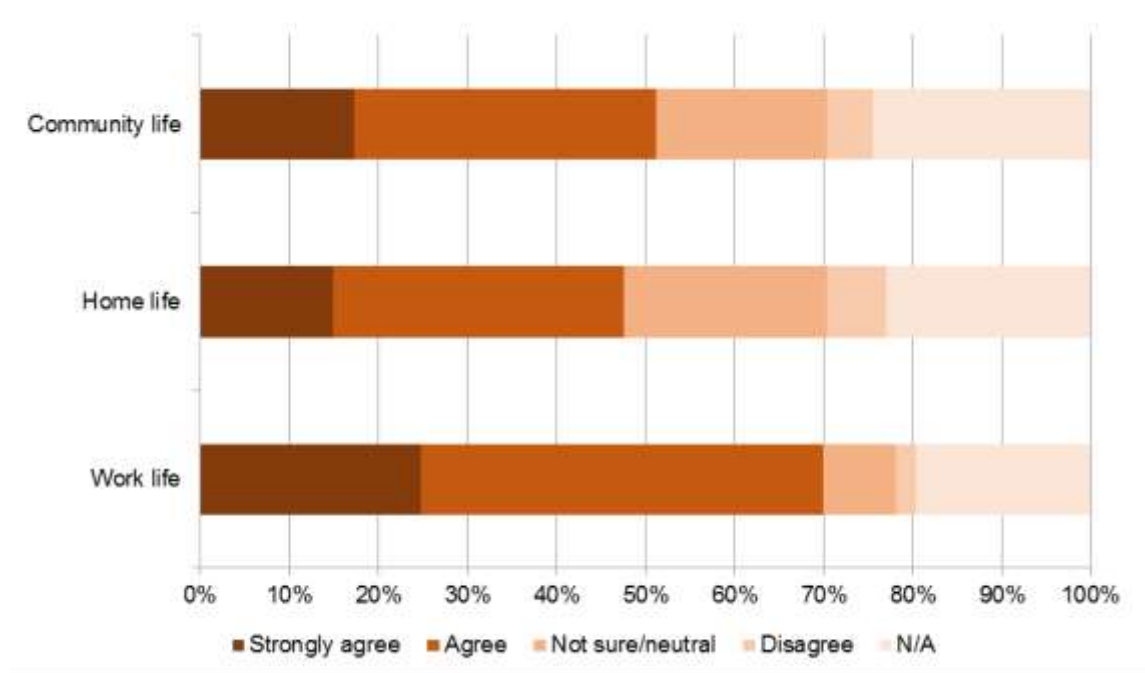
Source: ERS Union Workplace Representative Survey 2015

- 5.58 A significant proportion of Union Workplace Representatives believed that workplace relationships had improved across these groups as a result of undertaking Wales TUC courses within the 2010-13 period. Almost half (45 per cent) of representatives either agreed or strongly agreed that working relationships had improved with representatives from other unions in their own or other workplaces, between management and the union in their workplace, between members and the union in their workplace and between management and members in their workplace. A relatively high proportion, almost four in ten responses cited their answer 'not sure/neutral'. This finding warrants further exploration.

### **The Social Impact of Wales TUC Training**

- 5.59 This section of the report considers the wider impact of the union led learning model on participant's community, home and work life. This was one of the nine Learning services objectives in the Business Plan 2010-13. Our survey of Union Workplace Representatives collected this data and Figure 5.6 reflects the findings.

**Figure 5.6 – How the skills, knowledge and confidence gained from the TUC courses attended between April 2010 and March 2013 had supported Union Workplace Representatives in other parts of their work, home and/or community life (n=330)**



Source: ERS Union Workplace Representative Survey 2015

- 5.60 Significantly, 70 per cent of representatives either agreed or strongly agreed that the skills, knowledge and confidence gained from the Wales TUC courses attended between April 2010 and March 2013 had supported their work life.
- 5.61 Nearly half of all representatives agreed or strongly agreed that the courses had impacted positively on their home life, with over half agreeing it has supported their 'community life'.
- 5.62 The majority of comments made were very positive about their experience, reflecting on the increasing confidence and skills gained from being a trained Union Workplace Representative, which they have taken into their work, community and home life. A selection of quotes from Union Workplace Representatives are included below.

"Skills you have learnt from the courses carry through to your everyday life"

"I have found the experience has given me more confidence to participate and want to learn more"

"As a health and safety rep it has made me more aware of dangerous practices in my work and everyday life"

"I have become more aware of other people's opinions and skills etc. This has made me reflect and understand other people more. I have attended more local events and assisted with organising local events also - which I had never done in the past"

"The courses that I have attended have helped my self-confidence and also given me information about adult learning that I have been able to pass on to other people"

"I definitely have more confidence to tackle workplace issues"

"The skills gained have impacted on all areas of my life from negotiating paid time off with the employer, in both oral and written forms, budgeting at home and taking a greater interest in community life by becoming a Magistrate"

"I'm happier and generally more productive when I feel that I am both acting and developing in a way that has a positive impact on those around me, and my union involvement in general, encompassing the training I have undertaken, supports this"

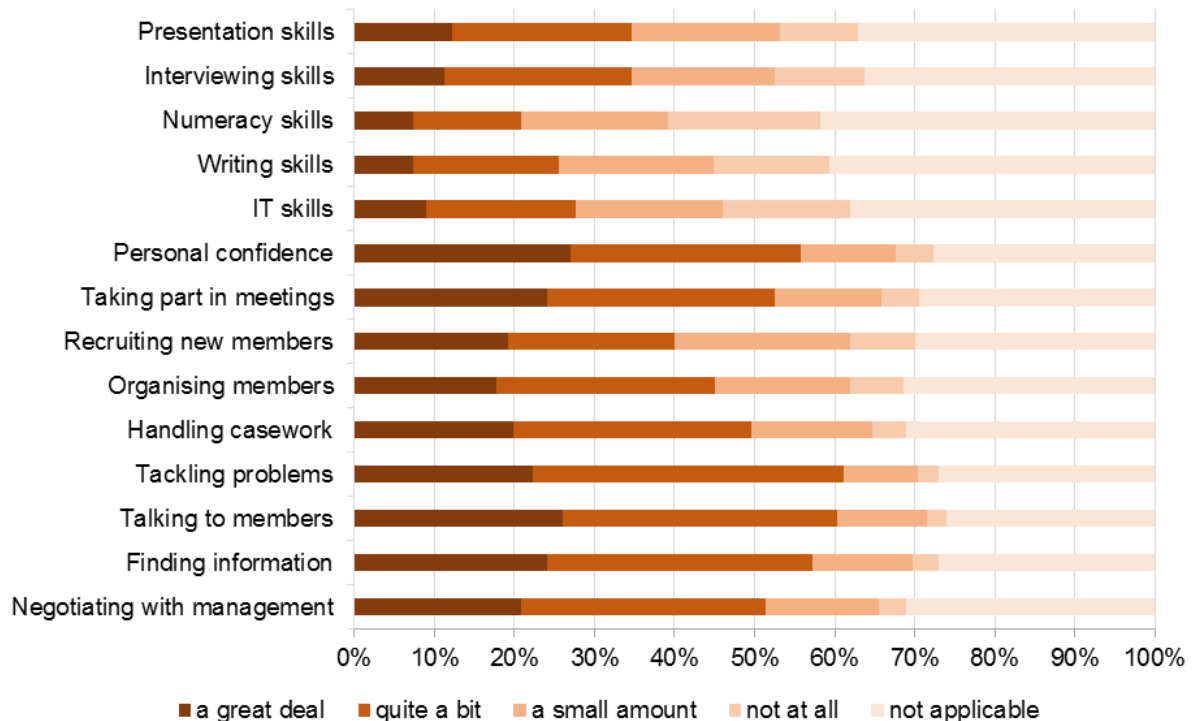
"Work life: I want to represent my members more efficiently. Home life: I have become a better listener, able to support my family in a greater capacity. Community life; I have always used my experience in supporting my local club, and neighbours"

"The confidence I have gained through knowledge I have learned through TUC courses had enabled me to get more involved in my local community and council forums"

"In my role as ULR we are constantly increasing our confidence and belief in our abilities to secure onsite courses through management negotiations"

- 5.63 Some representatives responded that they didn't feel their role as a Union Workplace Representative connected in any way with their work, home and community life.
- 5.64 To reflect on the effectiveness of the training courses, representatives were asked how far the Wales TUC courses attended between April 2010 and March 2013 helped them to develop their own skills. Results are shown in Figure 5.7.

**Figure 5.7 – How far did the Wales TUC courses attended between April 2010 and March 2013 help Union Workplace Representatives develop the following skills? (n=337)**



Source: ERS Union Workplace Representative Survey 2015

- 5.65 It is worth noting that to a large extent these findings reflect the added value of the programme insofar as they were not necessarily a key learning outcome of the course attended. To some extent this is reflected in the high proportion (approximately 30 per cent across all options) of 'not applicable' responses.
- 5.66 Over half of all representatives experienced added value in terms of: Personal confidence; Taking part in meetings; Tackling problems; Talking to members; Finding information; and Negotiating with management. Clearly these competencies are useful across the range of Union Workplace Representative roles and more widely inside and outside of the workplace.
- 5.67 Our survey asked representatives to reflect on the difference the support and training from Wales TUC made across a range of further areas. Figure 5.8 displays the key findings.

**Figure 5.8 – What difference did the support and training received from Wales TUC between April 2010 and March 2013 make to Union Workplace Representatives in the following areas? (n=337)**

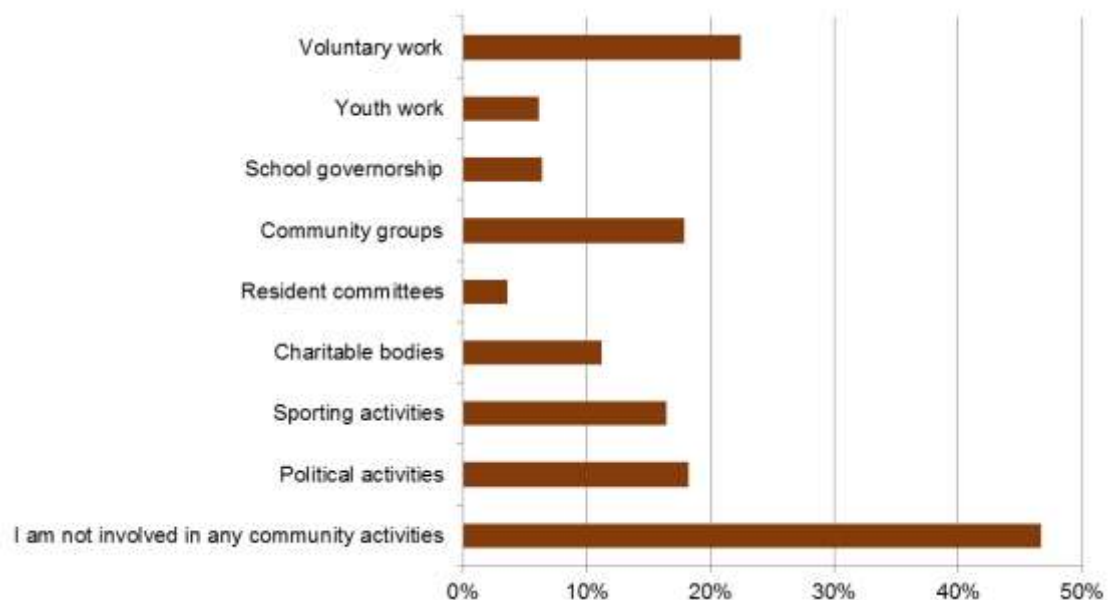


Source: ERS Union Workplace Representative Survey 2015

- 5.68 Over 20 per cent of Union Workplace Representatives felt the support and training had made a great deal of difference to personal confidence, personal satisfaction and enrichment through learning and aspiration to undertake wider learning. Over 40 per cent of representatives felt that support and training had made a difference (rated as being either a 4 or 5 likert scale). The evidence suggests the overall results to be positive, not only in terms of developing the capability to undertake the union role but also in contributing towards wider capacity both in and out of the workplace.
- 5.69 Our research with unions identified a raft of wider benefits for those individuals taking part in Union Workplace Representative training coordinated by Education Services. There was a broad consensus that the ULR training enabled representatives to address their learning and progress forward in their own lives, equipping them with the tools and knowledge for their personal development. We also know that many representatives had continued to progress with their training and had undertaken a variety of additional courses available, providing them with a greater understanding of their role.

- 5.70 Wider reflections included a number of examples of further changes taking place for individuals, following the completion of courses:
- Individuals had successfully applied for promotion in the workplace;
  - Individuals had taken on a professional role within the union; and
  - Individuals had left their role to start their own business.
- 5.71 The survey of Union Workplace Representatives indicated demonstrated the scale of wider community activity undertaken, as presented in Figure 5.9.

**Figure 5.9 – How were Union Workplace Representatives active in their community? (n=330)**

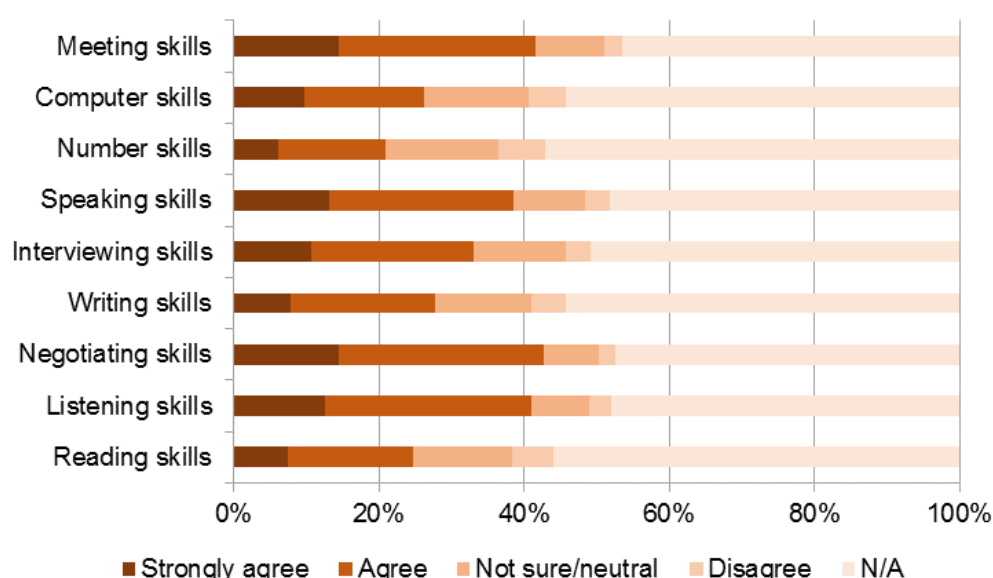


Source: ERS Union Workplace Representative Survey 2015

- 5.72 More than half of all Union Workplace Representatives were active in their community, of which about a quarter devoted 6 or more hours a week to the activity. A quarter of Union Workplace Representatives who were active in their community felt their Union supported them with their community activities. The most common areas of support from unions were the time off unions could negotiate for representatives to attend particular activities, followed by the use of resources and union facilities.

- 5.73 In addition, Union Workplace Representatives also reflected on the skills they developed during Wales TUC training courses that supported their community activities, as detailed in Figure 5.10.

**Figure 5.10 – How did the skills developed during the TUC training courses support Union Workplace Representatives in their community activities? (n=305)**



Source: ERS Union Workplace Representative Survey 2015

- 5.74 In total, over 40 per cent of representatives either strongly agreed or agreed their skills in meeting, negotiating or listening had supported them in their community activities. 20 per cent responded in a similar manner for skills in numbers or reading, although it is worth noting that many of the representatives would not have been deficient in this area. Again it is important to note that almost half of representatives responded 'not applicable' across these areas.

### Course Materials

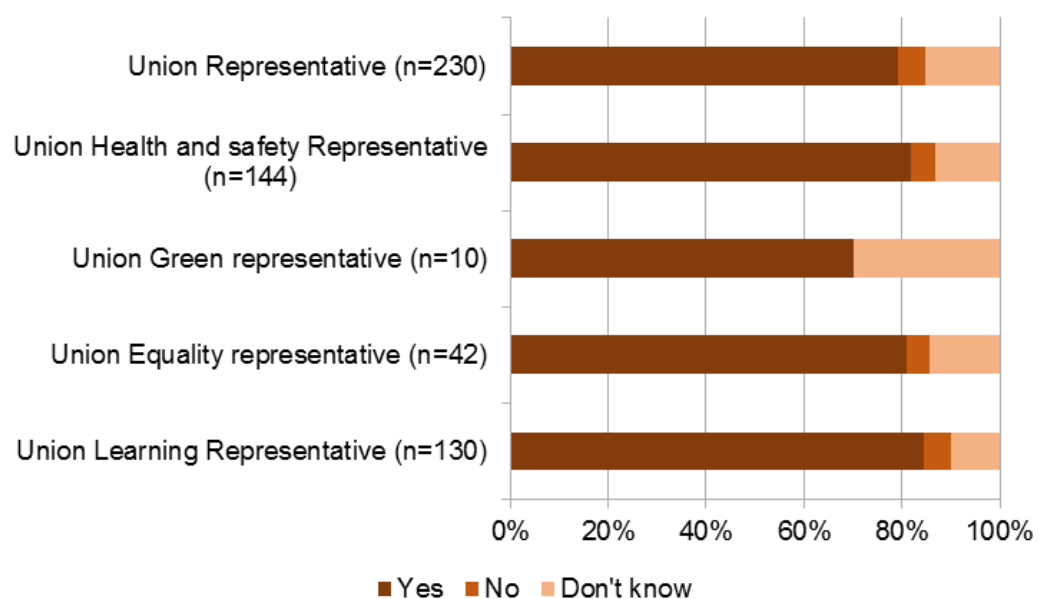
- 5.75 This section of the report assesses the degree to which the course material was up to date and fit for purpose. This is clearly important if Union Workplace Representatives are to be trained effectively to fulfil the role.
- 5.76 Agored Cymru standardisation events took place in October 2012 and all four trade union study centres were represented. The OCN standardisation meetings took place to ensure levels were awarded consistently across UK programmes. Annual tutor briefings also took



place across this period, which included sessions on standardisation, recruitment, professional development and developing course materials.

- 5.77 Education Services supported and developed Trade Union Education Centres by providing tutor training on the curriculum and organising update meetings on Wales TUC policy, administration and best teaching practice.
- 5.78 Education Services, alongside Agored Cymru, Coleg Gwent and WEA highlighted the approach taken in improving both the core content and the processes by which courses were delivered. They also highlighted that considerable progress since 2010 with the development of standardised workbooks that enabled consistent delivery across learning providers. This was delivered via close working between the key partners and has served to enhance and strengthen these key relationships. This is important in ensuring that further ideas on improvements can be discussed openly and honestly. The working arrangement with Education Services and these partners mentioned above still underpin the learning programme.
- 5.79 Our survey of with Union Workplace Representatives asked whether course material from specific Wales TUC training, undertaken between April 2010 and March 2013, was up to date and fit for purpose. The results are shown below in Figure 5.11.

**Figure 5.11 – Was the course material from Wales TUC training up to date and fit for purpose? (n=379)**



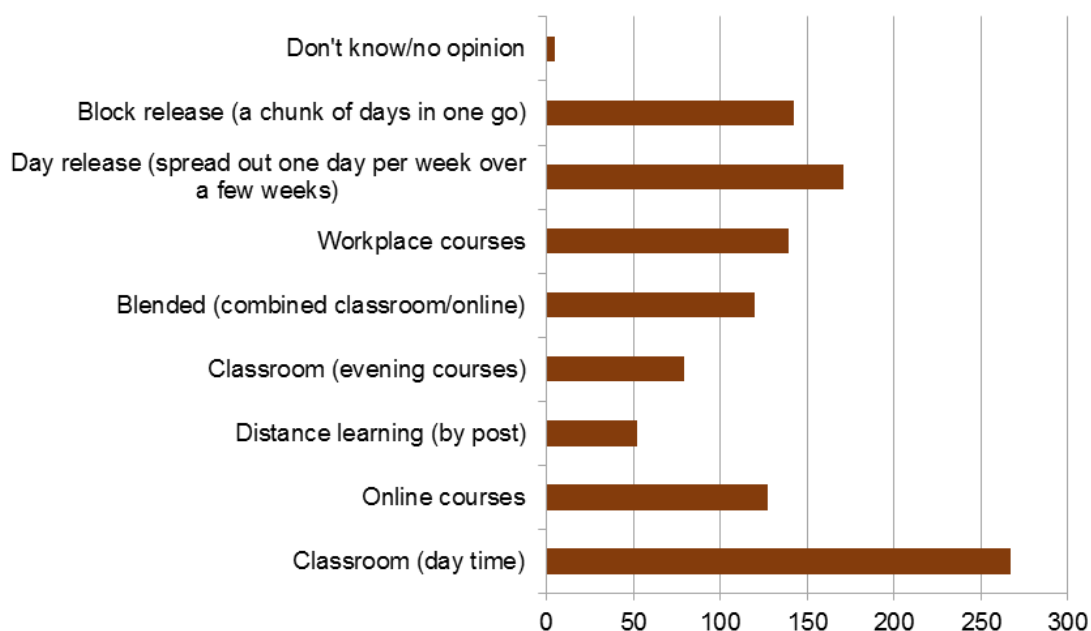
- 5.80 Overall, the majority of all representatives consulted believed the course materials to be up to date and fit for purpose. In all, across the Union Workplace Representatives responding, a minority of 5 per cent thought the contrary. Whilst this number is small it is important that Education Services, and partners, continue to assess course content.
- 5.81 The overwhelming consensus from union interviews was that the course material was up to date and fit for purpose. There was evidence of unions engaging with Wales TUC to ensure the courses were updated and in line with national policy or any accreditation changes. It is evident from the research that Education Services, alongside Coleg Gwent and WEA were regarded as effective and efficient in seeking to improve the course offer to provide the best offer to learners.

### **Working with Atypical Workers**

- 5.82 This section of the report identifies how Education Services sought to improve access to union learning via non-traditional methods, and the effect this had on Union Workplace Representatives.
- 5.83 Balancing inclusiveness with practicality has long been an issue for any organisation delivering learning on the scale managed by Wales TUC. Our research with Wales TUC, union staff in various roles and levels, Union Workplace Representatives, learning providers and employers has provided no silver bullet that will meet all needs. We know that since 2013 there has been an increase in the opportunities to undertake blended learning that involves a mix of approaches including class based and online. This shift was recognised by a number of unions involved in this research.
- 5.84 The evidence is that Wales TUC was proactive in reviewing how to optimise course delivery. For example, they established a task and finish group to consider opportunities and risks and consultation was undertaken with the Education Officers of the main Union Programmes to discuss their future requirements. During 2012-13 Wales TUC promoted the new e-note learning methods developed by the British TUC. This led to the promotion of E notes through Trade Union Centres during each quarter of 2012-13 through card and e flyer. Learning providers were also encouraged by Wales TUC to use e-notes where appropriate as an extra resource in the classroom.

- 5.85 Trade union studies centres routinely delivered courses taking place outside the college on weekends and evenings. These courses were hosted in workplaces or community buildings for the convenience of the learners.
- 5.86 Our research has identified some areas where the provision of courses could have been more flexible to the requirements of learners, alongside some examples of where modifications implemented improved the offer. There were also operational issues i.e. if a learner was ill and couldn't complete part of Stage 1 then they could not pass and progress onto the Stage 2 course. The union worked collaboratively with Coleg Gwent to identify a solution and consequently the course was structured as two days per module. Any participants unable to attend the second or third module would still achieve the 3 credits and be able to complete the remaining module at a later date.
- 5.87 ULR courses were previously delivered one day a week and amending this to two weekend courses providing welcome flexibility for learners. The union that cited this example also reflected that this demonstrated that Wales TUC understood the requirements of atypical workers. Of course, we have to be careful in presenting this as 'problem solved'. We have no way of knowing conclusively but expect that some learners would have found the shift to weekend courses less positively. Overall the modifications did have a positive impact.
- 5.88 In terms of providing a brokerage role we know from interviewing unions that Learning Services has suggested flexible learning providers, a key example being a provider that was able to accommodate night shift workers.
- 5.89 Our research with Union Workplace Representatives gathered data on preferred forms for course delivery, with the findings shown below in Figure 5.12.

**Figure 5.12 – Preferable form of course delivery for trade union courses and training in the future (n=337)**



Source: ERS Union Workplace Representative Survey 2015

- 5.90 Representatives were able to identify multiple preferences. In total 4 out of 5 representatives expressed a preference for day time classroom based courses. This aligns with the most common form of delivery during 2010-13 and aligns with the views expressed from wider stakeholder consultation.
- 5.91 Approximately a third of representatives prefer the blended option i.e. combined online and classroom delivery. The key message from this is that whilst many representatives are flexible there is a diverse range of preferences to balance.
- 5.92 Providing flexibility and ensuring individuals do not take as much time away from work is therefore important to employers and employees. To some degree the decisions on providing more flexible course delivery should be focussed upon those that at present cannot access the mainstream i.e. the fifth of representatives who responded who did not express a preference for day time classroom based courses.
- 5.93 Our research with unions identified a broad consensus that online and blended learning programmes can be useful in widening participation. Our research also identified the benefit of continuing with class based learning. Wales TUC, unions and representatives agreed that this provided an opportunity to interact with peers to develop a network of support.

- 5.94 Since 2013 there has been greater consideration of the need to deliver union learning via non-traditional methods including online learning and out of traditional working hours learning for those atypical workers who work shifts, are self-employed and who may not work in a traditional working environment. Interviews with Wales TUC revealed that since 2013 the increase in online courses as part of a blended learning package has increased the number of women undertaking training courses.
- 5.95 We know that Wales TUC is currently considering further options for blended learning as a direct consequence of expected further restrictions on facility time being rolled out by the government.

## 6. Essential Skills

### Introduction

- 6.1 The union-led learning model has traditionally supported learning in basic skills, covering literacy, numeracy, ICT and ESOL.
- 6.2 Shortly prior to 2009, Wales TUC was approached by the Welsh Government to employ two bespoke Essential Skills Project Workers funded via ESF to work with unions and negotiate with employers. Initially, this involved a one-year project funded by the Basic Skills Cymru arm of Welsh Government to deliver the Basic Skills Employer Pledge in unionised workplaces throughout Wales in line with the Welsh Assembly Government's Basic Skills Strategy *Words Talk – Numbers Count*<sup>1</sup>. The two staff members were subsequently contracted for the two following years so were in post for the whole three year period covered by this evaluation.
- 6.3 The main focus was engaging with private sector employers in Wales who had, or who were developing union-led learning arrangements within their workplace. It was recognised at this time that a greater emphasis should be placed upon ensuring existing signatories of the Employer Pledge carried out all necessary processes associated with the Pledge to maximise the number of Basic Skills learners benefitting from the scheme.
- 6.4 The role was also to support workers in trade union recognised workplaces facing the threat of redundancy by brokering basic skills support and provision as part of a Wales TUC rapid response initiative. This clearly aligned with wider activity of Learning Services during 2010-13 relating to redundancy support.
- 6.5 Our research with employers identified that basic skills was a major issue within many of the workplaces. We also know that in some workplaces with a largely professional workforce the demand for essential skills is much reduced. It was evident that a number of larger employers had existing mechanisms to tackle the basic skills deficit in their workforce so did not require or utilise Wales TUC Essential Skills staff resource.

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<sup>1</sup> Words Talk, Numbers Count: Post-16 Basic Skills PLASC Arrangements, Welsh Assembly Government Circular No: 029/2007 Date of issue: 3 September 2007

- 6.6 During the 2010-13 period, workplace basic skills responsibility passed to the new Essential Skills Wales Team. Wales TUC continued to engage with this new team alongside the Basic Skills Cymru led European Convergence funded project. The 'Building Basic Skills through Union-lead Learning' project continued to be funded and Learning Services continued to support the activity, ensuring engagement with union led-learning.
- 6.7 The inclusion of the Essential Skills Project Workers within Wales TUC Learning Services team not only provided specific experience in this area but also enabled Development Officers to focus their time on other priority areas. This was important given the pressures to deliver the agreed Business Plan 2010-13.

### **Essential Skills and WULF**

- 6.8 During 2010-2013 Learning Services worked alongside the Welsh Government and unions to embed essential skills provision into the WULF programme. Wales TUC worked with a number of WULF Project Managers to ensure ESIW was included in WULF bids, enabling the message to reach some of the more challenging employers that perhaps would not have been reached by the contracted provider network.
- 6.9 Our research revealed strong support for this approach from WULF Project Managers who reflected positively on the ongoing support they received from Wales TUC Essential Skills Project Workers to embed ESIW courses appropriately into learning provision. It was recognised that this may not have occurred without Learning Services activity.
- 6.10 Aligning the ESIW programme with WULF project delivery had helped ensure the funding was in place for course provision across a number of workforces. For one particular employer, the ESIW programme coordinated literacy, numeracy and Basic Computing courses, while the WULF project funded equipment including laptops and computer software for an onsite Learning Centre, enhancing the future learning offer for employees.
- 6.11 The Essential Skills Project Workers managed workshops during ULR conferences, Networks of Excellence meetings and the two annual Essential Skills seminars, to update ULRs on Welsh Government changes to the ESIW programme.

- 6.12 Interviews with ESIW Project Workers indicated that this improved the confidence of ULRs in identifying skill gaps within workforces and engaging employees in learning, in turn supporting the development of union-led learning through the ESIW programme. Examples of good practice were also shared with ULRs, illustrating where ESIW courses had been effectively integrated into workplace learning and particular barriers that were addressed.
- 6.13 The report *Evaluation of the Delivery and Quality Assurance of Post-16 Basic Skills Provision*<sup>2</sup> from 2013 on behalf of the Welsh Government included a number of key findings that evidenced the approach taken by Wales TUC including, employers recognising the value of unions and ULRs in particular in promoting learning to their workforce.
- 6.14 The report also reported that WULF projects focussing on essential skills were highly compatible with the Welsh Government's essential skills provision, and that WULF funded projects have helped develop a learning infrastructure (learning centres, learning committees, learning agreements) that brought learning to learners. We know from research with unions, WULF Project Managers and Wales TUC that activity funded through the 2010-13 contract was targeted at these areas.

### **Supporting Employer Engagement**

- 6.15 Learning Services played a key role approaching employers that had not previously been engaged in the essential skills programme of activity. They initially engaged with employers to raise the awareness of the programme and explain the benefits for the wider workforce. Employer engagement packs were circulated and presentations were delivered at stakeholder conferences across Wales to promote the programme.
- 6.16 Further promotional activities included presentations of Essential Skills in a number of ways, including union officer meetings, employer roadshows, and facilitating meetings between unions and appropriate learning providers
- 6.17 Our research revealed that Learning Services attendance at learning at work days was also particularly valuable as a means of distributing information to employees across workplaces.

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<sup>2</sup> Evaluation of the Delivery and Quality Assurance of Post-16 Basic Skills Provision in Wales (2013) by York Consulting LLP



## **Support to Unions Engaging with Providers**

- 6.18 Interviews with WULF Project Managers and employers highlighted that Learning Services had successfully brokered relationships with specific learning providers.
- 6.19 An approved provider list was formulated by Learning Services to support WULF Project Managers, ULRs and employers to make initial connections. These providers included WEA Cymru, ADT and a number of Further Education colleges (which merged as a consortium post March 2013), all of which are accredited Welsh Government providers of ESIW. Learning Services also shared information on those providers that offered flexible services i.e. training over the summer holiday period. They were regarded by a number of WULF Projects as being instrumental in the development of essential skills courses between unions, employers and providers.
- 6.20 The approved learning providers were also very experienced at developing relevant course content for workplaces, ensuring they remained relevant and fit for purpose. The providers adapted learning materials from previously delivered courses, while working flexibly to ensure courses matched the bespoke needs of workers. Whilst courses included elements of English and maths, they were had deliberately not been packaged in this manner, to ensure workers were not dissuaded by the course title
- 6.21 Our consultation with unions demonstrated the value of this, reflected in the quotes below:

"They recommended providers of basic skills courses"

"Wales TUC enabled the connection between the WULF Project and the Essential Skills programme, arranging meeting with certain providers and sharing practice in other workspaces"

"They shared information about learning providers at a national level. This was valuable and wouldn't have happened without the Wales TUC networks".

"Wales TUC has shared information on additional funding streams and has played a role in brokering the cost of courses for the provision of a more sizeable budget"

## The Experience of Employers

- 6.22 Our research has also revealed that employers were largely unaware that Wales TUC was involved in delivering the strategy *Words Talk – Numbers Count*. We do however need to be mindful that our research with employers consisted of 19 employer interviews. For those employers that did recognise the role of Wales TUC the support was highly valued, best demonstrated by the quotes below.

“There were a number of benefits to employees, including increased morale and confidence, leading to greater engagement in other forms of learning. There were business impacts including greater efficiency through less resistance to working with ICT. Individuals became more open to change. The organisation has since achieved the employer pledge award” - Housing Company

“Wales TUC Essential Skills Officers explained what other workplaces do. Our organisation was able to learn from them to ensure we didn't make particular mistakes and improved our efficient practices” -Local Authority

“The Unions have helped to implement the Essential Skills programme, ULR have provided networks for employees - signposting, learning opportunities, encouraging participation in the (company learning) programme” Utility Company

“This has made management more aware of the learning opportunities available, more aware of identifying skills gaps for particular groups of employees and the benefits of identifying particular gaps. Prior to engagement with ESIW, staff members wouldn't know where to look” Local Authority

- 6.23 Our research revealed that some employers recalled Learning Services sharing examples of effective course provision. For instance, good practice was shared across different local authorities and between large private sector employers, enabling organisations to learn from others and improve course provision in the future. Unions and WULF Project Managers reported that Learning Services had worked closely with employers to develop bespoke numeracy courses that were specific and most appropriate to their workplace. Additional value was achieved by Learning Services team enabling some union staff to identify particular workforce trends to inform the specific development of bespoke courses.

- 6.24 Several employers cited that essential skills training had impacted positively on employees' confidence, improving levels of communication between colleagues and with management, creating a positive impact within organisations.

### **The Experience of Unions**

- 6.25 As with other strands of Wales TUC activity our research revealed contrasting views in terms of take up of support available. A minority of unions did not engage with Wales TUC essential skills activity. These unions were largely those with a professional workforce or niche, specialised workforce, although a number unions highlighted that they delivered their own internal basic skills courses and/or that their courses need to be bespoke/industry specific to the workforce, thereby inferring that Wales TUC couldn't respond to this.
- 6.26 The majority of unions engaged in this research recognised that Wales TUC had added value in a number of ways. The support is best presented by way of quotes from unions:

"The inclusion of IT was important as a hook to engage employees in learning"

"The delivery of bespoke numeracy courses in the workplace was beneficial"

"Their [Wales TUC] annual stakeholder conference was important in marketing ESIW to prospective new employers that hadn't previously engaged";

"They [Wales TUC] provided regular updates to the union on ESIW activity"

"Wales TUC enabled the connection between the WULF Project and the Essential Skills programme, arranging meeting with certain providers and sharing practice in other workspaces"

"Discussions between the employer, learning provider and Wales TUC contextualised the development of the Essential skills training in correspondence with the business requirements. This made the learning relevant to working on the job. This impacted on the confidence of individuals, improving levels of communication with both managers and colleagues. Employers have been quick to see the benefit. Individuals began to apply for other roles and positions, with increasing confidence to undertake their role in the workplace".

"Wales TUC has shared information on additional funding streams and has played a role in brokering the cost of courses for the provision of a more sizeable budget"

- 6.27 There was a broad consensus on the role played by Wales TUC at many levels in driving forward and creating opportunities for workplaces through the ESIW programme, but also areas where the offer was either not relevant or could have been better targeted. As mentioned previously the success of this programme has influenced by the appetite and engagement of unions, workplaces and individuals.
- 6.28 Throughout 2010-2013, there were also many instances of Learning Services and ULRs working closely with employers and learning providers to ensure course delivery was contextualised and bespoke for workplaces. This has meant that courses could be developed that were most appropriate for the requirements of particular workforces.
- 6.29 Crucially, Learning Services recognised it could take a long period of time to establish relationships between employers, unions and providers and to fully develop ESIW courses. They were therefore prepared, and resourced, to continue supporting this as they understood the potential benefits. On the basis of the research with unions and ULRs, there remains a need to continue momentum within workplaces, which is where the role of the ULR brings added importance.

## **7. Supporting Union Learning Representatives**

### **Introduction**

- 7.1 This section of the report identifies the role of Learning Services in the recruitment and support of ULRs between 2010-13. It also covers the wider issue, and resultant impact of Wales TUC activity in supporting the development of learning agreements that provide a framework from which the union led learning model can be delivered. This section also outlines the role and benefit of the resource allocated to managing the Networks of Excellence and wider information sharing mechanisms.
- 7.2 As part of the Business Plan 2010-13 Learning Services prioritised ULR recruitment, networking and workplace visits to specifically develop promotional strategies for union learning to encourage learner recruitment and retention. We know from engaging with unions and employers as part of this research that the recession had an adverse impact on the number of ULRs recruited and retained between 2010 and 2013. During this period 2010-13 there was increased emphasis within many workplaces for employees to focus upon their core role during tough economic times and this reduced both the capacity of existing ULRs (pre April 2010) and appetite of employees to become ULRs. However, during the 2010-13 period covered by this evaluation an additional 385 ULRs were recruited, greater than the 300 target agreed at the outset.

### **Approach to Recruiting ULRs**

- 7.3 Learning Services developed specific ULR recruitment strategies for unions to attract additional employees to the role. Elements included:
- Designing ULR recruitment material;
  - Coordinating ULR visits to other workplaces to raise awareness;
  - Linking ULRs from other projects and unions;
  - Making presentations to management teams on the business case for ULRs;
  - Presenting at officer meetings;
  - Attending ULR courses;
  - Undertaking workplace visits to ULRs to provide briefings; and
  - Organising sector and union clusters of ULRs.

- 7.4 Close working with unions was vital to the identification and recruitment of ULRs. This was one very clear and obvious advantage of Wales TUC delivering this contract. Our research has revealed that bespoke approaches were required in response to the different needs of unions.
- 7.5 The majority of unions interviewed recognised the support that was available and valued the support from Wales TUC staff. Our research did however identify a minority of unions that did not understand the offer and that also chose not to actively engage with Wales TUC. This evaluation has evidenced clear and regular communication and therefore this lack of understanding is not due to any lack of application by Learning Services.
- 7.6 Learning Services supported individual unions via joint engagement with employers. Learning Services sought to recruit ULRs from larger employers, recognising that the rewards, in terms of the number of potential learners, would be more significant than for small businesses. The approach of targeting anchor companies led to a review of union learning representation in such companies, discussions with relevant unions and then targeted approaches.
- 7.7 In engaging with employers it was regarded as important to contextualise the role and make it relevant to the specific business. A number of unions highlighted the value of Learning Services staff expertise in delivering this. Once the case was established and the employer is committed, Learning Services assisted unions to identify potential ULRs and advise them of the training offer provided by Education Services. This added capacity was regarded as critical by the unions supported in this way.
- 7.8 On the basis of the research undertaken it is evident that during 2010-13 Learning Services had a clear plan of activity for supporting the recruitment of ULRs and that this was effectively delivered by experienced and capable staff.

### **Ongoing Support for ULRs**

- 7.9 This part of the report summarises the wide range of activity specifically designed to support ULRs post training. The rationale for continuing support to ULRs is clear and included ensuring they continue to access further training and understand good practice.

- 7.10 Peer support through regular meetings was also regarded as particularly important for ULRs who were operating as either the sole ULR in a workplace and/or are geographically isolated in more rural parts of Wales.
- 7.11 Key initiatives developed by Learning Services included:
- Non-residential ULR events annually across Wales that focused on knowledge and skills development. In the second and third year of the programme, over 180 delegates attended the ULR conference and the feedback received was reportedly extremely positive.
  - ULR clusters ensured that every ULR had access to a relevant cluster group and/or Networks of Excellence. To achieve this, Learning Services monitored existing and newly formed clusters, offering support and guidance as and when appropriate.
  - Seminars and similar events addressed the knowledge and development needs of existing and new ULRs. Across the three years, at least two seminars were held across Wales each year.
- 7.12 Our survey of Union Workplace Representatives revealed that 93 per cent of surveyed ULRs considered Wales TUC kept them informed of developments within union learning, by publicising new courses, sharing good practice and invitations to events. This is remarkably high and reflects the success of the Wales TUC approach.

### **Climbing Frame**

- 7.13 In 2010 Learning Services implemented the Climbing Frame, a website and online tool created exclusively for ULRs to help support learners and promote learning in the workplace<sup>3</sup>. The value of the tool was tested by Unionlearn in England and the good practice replicated across Wales.
- 7.14 In 2011, a pilot programme among 30 ULRs was completed, in order to assist them using the Climbing Frame software to log their activities with learners. From this sample activity, a report was produced and shared with the Welsh Government in 2012.

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<sup>3</sup> <http://www.wtuclearn.org.uk/climbing-frame>

- 7.15 Building on this, Learning Services made the 'Climbing Frame' ULR software available to all ULRs. Furthermore, uptake was encouraged through the production of an information leaflet to promote and explain its use. This was distributed at all Union Workplace Representative courses. An E-note<sup>4</sup> was also produced and a Climbing Frame App was being developed for the planned launch in 2013.
- 7.16 Due to the encouragement and promotion, the Welsh Climbing Frame reportedly had the greatest level of uptake compared with any other UK region.
- 7.17 In addition, the Climbing Frame was added as an introductory resource which was provided to ULRs, enabling the opportunity for ULRs to familiarise themselves with the software from the beginning. This was further encouraged at the two day ULR conference where Climbing Frame workshops were provided. Three workshops were delivered to approximately 60 ULRs and further training was offered to new ULRs. We know from our interviews with unions that the Climbing Frame was often referenced in positive terms.

### **ULR Views on Wales TUC Training and Support**

- 7.18 ULRs believed the training courses and continuing support from Wales TUC between April 2010 and March 2013 was effective in assisting them to support members plan and manage their learning and development. Almost two thirds (65 per cent) responded very positively with either a 4 or 5 rating on the likert scale.
- 7.19 The survey considered how effective support from Wales TUC had been in assisting ULRs in negotiation and support for vocational learning in the workplace. On a 1 to 5 scale likert scale, 60 per cent of ULRs responded positively (with either 4 or 5 rating), indicating Wales TUC support had been particularly useful in assisting the ULR negotiation and support for vocational learning in the workplace.
- 7.20 In contrast, 11 per cent of representatives considered the training and support was not at all successful. Again, we regard that this is a positive result of the training and support provided by Wales TUC.

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<sup>4</sup> An online explanatory note that aims to assist the reader understand a particular topic in the a clear and simple manner.

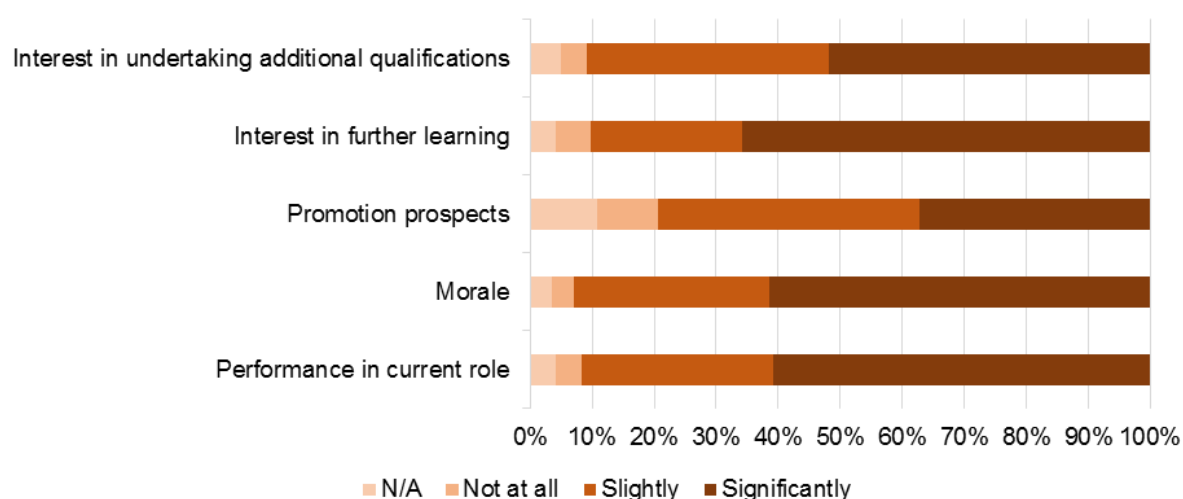


- 7.21 Overall, a significant proportion of ULR respondents felt support from Wales TUC between April 2010 and March 2013 was effective in keeping them up to date with learning opportunities and useful resources, enabling them to support members meet their learning needs (for example, through training courses, Networks of Excellence, Net News, seminars, conferences, etc.). On the 1 to 5 likert scale, over three quarters (77 per cent) of ULRs responded positively with either 4 or 5 rating.

### Impact of ULRs Recruited

- 7.22 Our survey of Union Workplace Representatives identified how ULRs had supported employees. The results from which are included in Figure 7.1.

**Figure 7.1 - How do ULRs feel their activities have supported employees in improving? (n=144)**

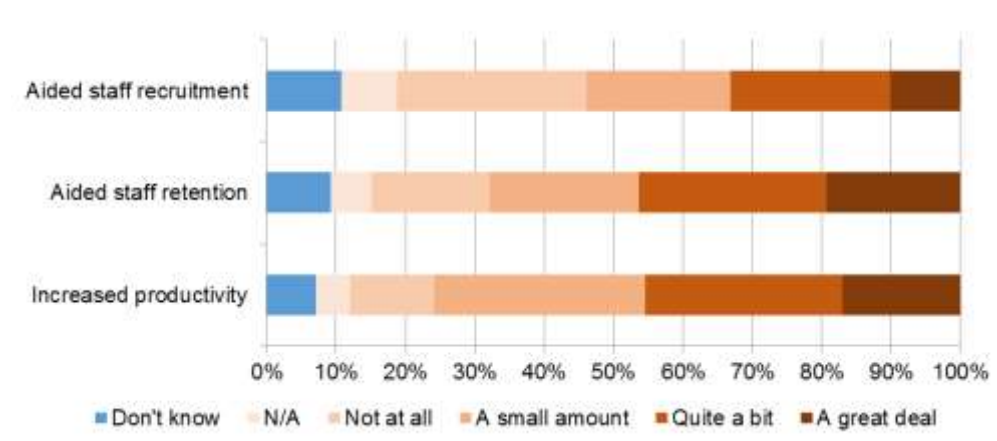


Source: ERS Union Workplace Representative Survey 2015

- 7.23 ULRs believe they made a difference for employees in a number of ways. In fact, 90 per cent or more of ULR respondents who first undertook ULR training in 2010-13 felt they make a difference for employees 'slightly' or 'significantly' in terms of 'morale', 'Interest in further learning', 'interest in undertaking additional qualifications' and 'performance in current role'.
- 7.24 Additionally, 65 per cent and 60 per cent of representatives (first trained in 2010-13) felt they made a significant difference to employee 'morale' and 'Interest in further learning' respectively.

- 7.25 Our survey asked how ULRs felt they also made a positive difference to employers, and the results are demonstrated in Figure 7.2.

**Figure 7.2 – How ULRs feel their activities have supported employers? (n=141)**



Source: ERS Union Workplace Representative Survey 2015

- 7.26 In summary 46 per cent of ULRs felt they made 'Quite a bit' or 'A great deal' of positive impact by contributing to aiding staff retention through their role. 45 per cent felt the same way in terms of contributing to increased productivity. However, ULRs felt they made less of an impact in terms of aiding staff recruitment with only a third believing they have made a reasonable impact. This is not surprising given that they would not have directly supported individuals who did not yet work at their workplace.
- 7.27 Research with unions and small number of employers undertaken as part of this evaluation indicate there may have been a large number of individuals who wouldn't have benefited from the ESIW programme without the role of ULRs, particularly those individuals identified as traditionally harder to engage in training. We have not, however, been able to quantify this.
- 7.28 Our research has identified a number of areas where stakeholders highlighted added value has been achieved, demonstrated via the direct quotes below:

"Would have been difficult for us to recruit ULRs without Wales TUC support due to capacity"

"Learning Services Development Officers met with ULRs on a monthly basis, keeping up working relationships and to remain aware of support needs"

“Ongoing support for ULRs has been vital, to ensure they feel confident liaising with managers and providers”

“ULRs provide a vital link between learner and Trade Union. Whilst learners may be unlikely to contact their line manager regarding learning opportunities or any challenges they may face, they may be more willing to engage with ULRs, building up a trusting relationship”

“ULRs were initially nervous and grew in confidence substantially”

“Prior to 2010 the union had few learning representatives, but this has gradually increased. Wales TUC was important in supporting this”

“With the support for Wales TUC the ULRs can do their role, especially as the range of courses was appropriate”

“Wales TUC provides great value, reaching individuals who otherwise wouldn't have undertaken the training”

“Wales TUC ensure we are very well informed of developments nationally and the experience of other projects through the presence of strong networks. The networks may fall away without Wales TUC”

“Wales TUC played a role in providing posters with information on the ULR role to develop interest”

“ULRS had an important role in relaying information between staff, WULF Project Managers and employers and potential strands of funding, from information from the Networks of Excellence or conversations with other ULRs or Wales TUC to gather this information, ensuring communication remains strong.

“Wales TUC supported in recruiting ULRs, attending meetings to encourage ULR involvement, by explaining the responsibilities and rights associated with the role. Wales TUC then pay for and organise ULR training”.

“Ongoing support the ULRs, who know they can approach them on a regular basis or if they are unsure about employment rights or handling specific challenging situations in the workplace. Without this support, ULRs may feel out of depth and it may not be possible for them to continue in their role”

- 7.29 A number of unions identified areas where the Learning Services activity could have been more effective in recruiting and retaining ULRs. To some extent the issues raised below are contrary to other views expressed from a much wider group of stakeholders consulted.

- 7.30 The responses include examples of where individual ULRs had not had the desired impact in a particular workplace and the union movement has not embedded them into workplaces as might have been the case. It was felt the ULR remit has developed outside of the unions, rather than as traditional trade union representative as part of the collective unified approach.
- 7.31 There was a suggestion that more support for ULRs is required to ensure these are integrated within the union and not seen as separate. It is important ULRs play a more activist role. It is important they have more of an advocacy role, whereas signposting has become more of a focus.
- 7.32 In some workplaces the role of the ULR was still misunderstood and they are not operating as well as they could be. The solution to the latter point requires ongoing dialogue between Wales TUC and unions that believe this to be the case.
- 7.33 A number of unions expressed the view that ULRs required greater mentoring and ongoing support from Learning Services. However, we know of examples of where Learning Services have supported ULRs on a one to one basis via monthly meetings. There was a need therefore to better communicate the scope of the Learning Services offer and/or for Learning Services to ensure a consistent offer across unions and ULRs. This also raises an important question as to where Learning Services support should end and where union support should commence.
- 7.34 One union believed that Learning Services should have offered more intensive support to ULRs, involving enhanced opportunities to engage with other unions. Our own view based on the research undertaken is that Learning Services provided a number of regular opportunities for this, such as the Network of Excellence, conferences and other events. Whilst the majority of stakeholders consulted were aware of such opportunities it is important the Learning Services continue to publicise events, etc. to union officials at a range of levels.
- 7.35 Our wider interviews with union and employers has enabled wider qualitative data to be collected and analysed. Overall, the support from Wales TUC is highly regarded. In short, this enables us to be confident in our assessment that this has been an important factor in enabling new ULRs i.e. first trained post April 2010 to be as effective in the role as those first trained pre-April 2010.

- 7.36 The majority of unions interviewed as part of this research recognised the added value of ULRs in supporting employees. A section of views are presented below:

“Wales TUC played a role in speaking to individuals interested and their managers. The ULR role has had significant impact on the individual, improving levels of motivation, morale and personal development”

“Following TUC support the ULRs know how to support individuals onto courses, understanding the timings, location, and requirements for individuals to attend”

“ULRs engaged with learners who otherwise may have been more difficult to reach. Without ULRs not much learning would have happened”

“Some ULRs have developed good relationships with company managers, ensuring learner agreement are signed and employees have access to training”

“There are a mix of ULRs in terms of those who are passionate and want to learn as much as possible using the climbing frame. Others are not so active”

“ULRs extremely valuable in liaising with managers, employers and learners. They recognise the support needs of workers both in a learning and personal sense i.e. they may be aware of stress issues”

“ULRs play a crucial mentoring role”

“ULRs are aware of the Essential Skills training employees require and appropriate qualifications necessary. ULRs also know the timings of particular training courses that would be most appropriate, due to the working schedules for individuals”

“ULRs encourage interest in particular courses. Workers may not have signed up for courses if pushed by management”

“ULRs report on the appropriateness of the course for individuals, reflecting on extra support needs they may have”

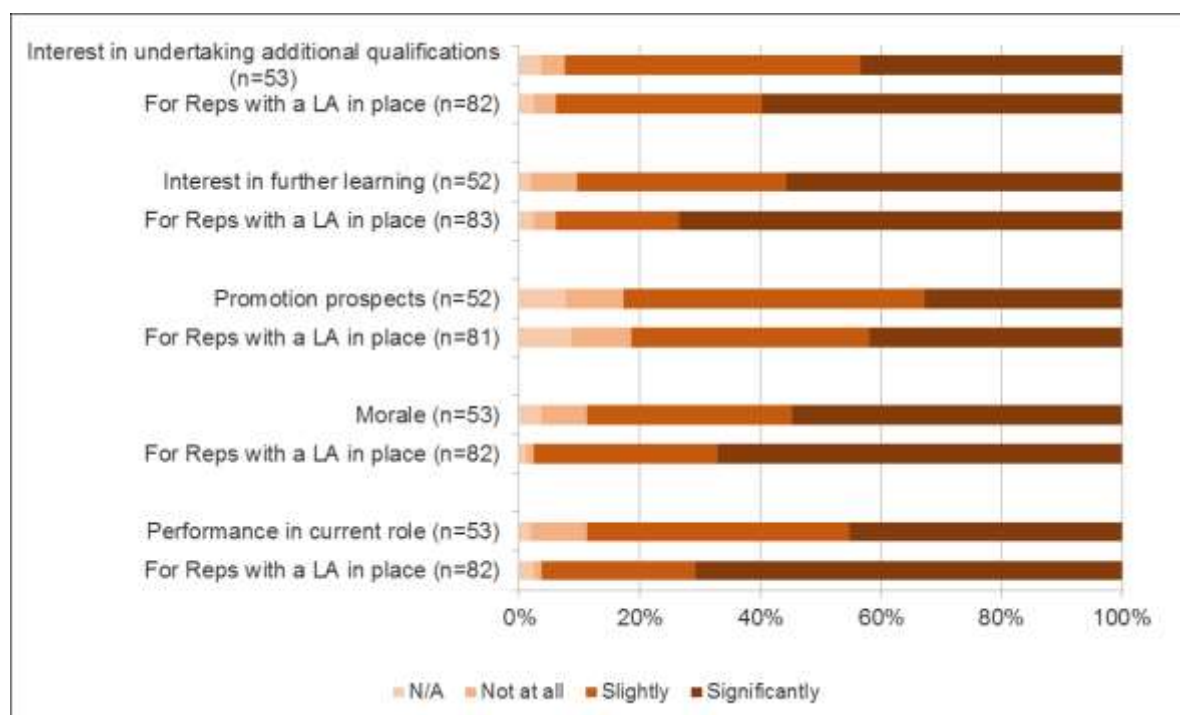
“ULRs play a very good role in recruiting learners, including arranging for them to meet course tutors and learn about important areas of training”

## **Union Workplace Representatives and Employers**

- 7.37 This part of the report covers the relationship between Union Workplace Representatives and their employer. The activity of Wales TUC covering workforce development strategies and learning agreements involved:
- Influencing the design and development of union leaning and skills strategies and policies;
  - Contributing to the preparation of draft documents and advising unions and workplaces on Learning Agreements;
  - Preparing the workplace action plans, identifying funding sources, integrating the plans into mainstream workforce development programmes, identifying potential providers and/or workplace facilities, progressing to supporting ULRs and others to deliver the plan;
  - At the most basic level providing example learning agreements; and
  - Offering advice and support for developing learning agreements at officer meetings at GMB and UNITE, presentations to multiple unions at the Strategic Forum and to all WULF projects at the Project Managers Forum.
- 7.38 From survey responses we know that three in five (n=339) of all Union Workplace Representatives had a workplace agreement in place with their employer that covers facility time, whereas 24 per cent (n=135) do not have an agreement in place. 16 per cent (n=89) do not know whether an agreement is in place.
- 7.39 In total, for all Union Workplace Representatives with an agreement in place, 68 per cent of them feel they have sufficient time to carry out their role. In contrast, only 37 per cent without an agreement in place feel they have sufficient time to carry out their role. Further analysis of the particular roles reveals that almost 70 per cent of Union Representatives with an agreement in place felt there was sufficient facility time to carry out the role, compared with just over 35 per cent of representatives without an agreement. 72 per cent of Union Health & Safety Representatives with an agreement felt there was sufficient facility time to carry out the role, compared with just over 40 per cent without an agreement.

- 7.40 Evidence drawn from the survey responses indicated that ULRs with a learning agreement were able to perform better in their role. Figure 7.3 reflects how ULRs feel their activities have supported employees across a number of areas.
- 7.41 Figure 7.3 is divided into five sections in line with different areas of support ULRs provided to employees. For each of these areas, responses were compared for ULRs with a learning agreement (LA) in place (displayed on lower bar), against ULRs either without a learning agreement or didn't know if this was in place (displayed on upper bar).

**Figure 7.3 – How ULRs feel their activities have supported employees in improving (n=135)**

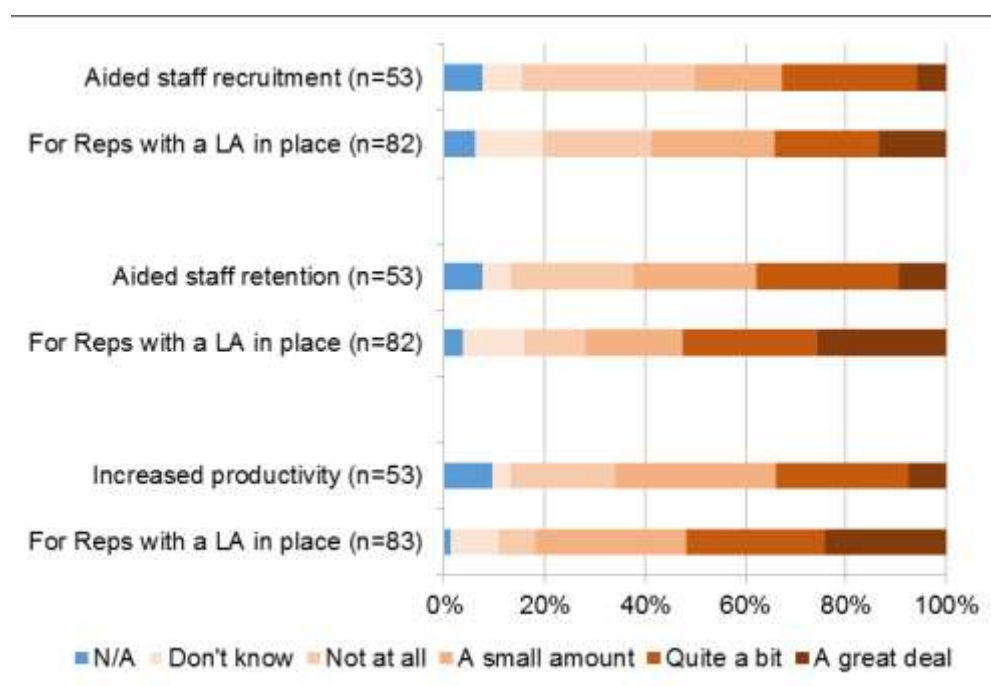


Source: ERS Union Workplace Representative Survey 2015

- 7.42 ULRs with a learning agreement in place felt their activities had more of a significant impact on employees across all of these domains than ULRs without an agreement in place. More than 70 per cent of ULRs with an agreement in place felt they made a significant difference for employees in terms of 'performance in current role', in contrast to just over 40 per cent of representatives without an agreement.
- 7.43 Additionally, more than two thirds of ULRs with an agreement felt they made a significant difference for employees in term of interest in further learning, in contrast to just over 50 per cent without an agreement.

- 7.44 These findings might go some way to suggest learning agreements can play an important role in a relationship between the Union Workplace Representative and the employer.
- 7.45 Figure 7.4 compares how ULRs with learning agreement in place felt they made a positive difference to employers, with ULRs either without an agreement or who don't know whether an agreement is in place.

**Figure 7.4 – How far have ULRs had a positive impact on employers in the following areas? (n=136)**



Source: ERS Union Workplace Representative Survey 2015

- 7.46 Across every domain, ULRs with a learning agreement in place felt they made a greater difference to employers. For example, more than half of ULRs with a learning agreement felt they made either 'quite a bit' or 'a great deal' of difference for employers in terms of 'increased productivity', compared with just over 35 per cent of respondents without an agreement.
- 7.47 Of those representatives with an agreement, nearly a quarter felt they made a significant difference, compared with less than 10 per cent without.



- 7.48 However, It is evident from a number of views expressed by ULRs that the presence of a learning agreements does not necessarily mean that facility time was granted:

“We do (have a Learning Agreement) but nevertheless, we have so few staff in workplaces that we are struggling to cope with our workload, so that business needs override facility time. All staff are stressed and union reps even more so”

“We have a learning agreement however we are constantly having to argue over facility time. They do not see learning as an important part of the company's culture”

“Some departments do have learning agreements. However these are not utilised to their full potential in terms of facility time for ULRs”

“Employer desperately makes it very difficult to get further time off from work”

“I have given draft agreements to the Operations Director, who says he is keen, but fails to put the time in to finalise”

“Yes (there is a learning agreement) but managers ignore it blaming business requirements and staff shortage stops facility time”

“Training for union duties is covered, but the definition of what constitutes a duty is very tight”

- 7.49 From the employer interviews undertaken it was not possible to draw any definite conclusions on the relationship between learning agreement and the role of the Union Workplace Representatives. This is perhaps worthy of further research.

### **Workforce Development Strategies and Learning Agreements**

- 7.50 Collectively negotiated learning agreements can be an effective tool to aid sustainable union-led learning. They are widely regarded as a good way of structuring the approach to embedding lifelong learning initiatives in the workplace, as well as supporting the rights that ULRs have. Learning agreements are also a tool for negotiating new facility agreements for additional time off, both for the ULRs and members undertaking a course of learning.

- 7.51 Learning Services has supported unions in developing and negotiating a learning agreement in workplaces where union-led learning initiatives had previously been established. During the 2010-13 period 34 new separate learning agreements were developed covering 594 separate workplaces. Learning Services also supported unions in reviewing learning agreements, often to enhance the depth and scope of the agreement content, and in particular to include joint workplace learning committees. This 'hands on' support, included attending meetings between employers and unions to press for the establishment of a learning agreement in the workplace. The aspiration at the outset of the programme was to achieve this at 15 workplaces each year, a target that was far exceeded.
- 7.52 As with many of the Wales TUC strands of delivery funded during 2010-13, unions largely accessed Wales TUC support where they had a gap. It is evident from interviewing unions that learning agreements were not appropriate in some workforces supported by particular unions i.e. those unions where members largely worked on a freelance basis. Alongside this, Learning Services supported unions in developing workforce development strategies as a precursor of learning agreements or as an alternative. Across the three years, the aim was to work with a minimum of 140 workplaces to create workforce development strategies. This target was achieved, with 356 workplaces supported during 2010-13.
- 7.53 It is evident from our research with unions that often Learning Services provided added value presenting a compelling case for action to employers and this was regarded as vital to successful negotiations. A key example is the case of a large employer, where multiple unions came together with support from Learning Services to ensure an appropriate learning agreement was signed. Wales TUC believed that a greater number of employees were recruited onto training courses as a direct consequence.

### **Engaging Employers**

- 7.54 Almost half of the employers interviewed had some form of self-defined workforce development strategy and/or learning agreement in place. This is not unsurprising given that many of those employers engaged were large organisations that traditionally had an organisational infrastructure in place.

7.55 Our research identified that while the majority of employers developed their procedures in house without support, a number had either support of their union or Wales TUC. Very few employers interviewed believed that Wales TUC helped embed learning cultures in their workplace.

7.56 It was evident however that many had a pre-existing commitment to learning. However, we know that for a number of employers this was a tangible outcome of Wales TUC activity, best demonstrated through direct quotes:

“An increased culture of learning in the workplace, introducing people to learning who hadn't been in a classroom for a long time” - Local Authority

“A number of next steps organised to access staff members in the future. For example, aiming to access other staff who may be more challenging to reach, including school support staff, catering/cleaning , leisure centres staff, Day Centre, EMAS staff” - Local Authority

7.57 Examples of Wales TUC support are provided below:

“Initially there were regular meetings with Wales TUC to develop this (learning agreement), involving meetings with providers and the Executive team for the organisation. This wouldn't have happened without Wales TUC that provided a package for workplace representatives and service managers. Without this, we would have struggled to get release for employees to attend training. This was invaluable. Wales TUC also supported the organisation to develop an Employer Pledge. Wales TUC arranged a formal meeting to explain the rationale behind the Employer Pledge and Learning Agreement to the Employer” - Utility Company

“Wales TUC was involved in this process, particularly during initial meetings to develop the learning agreement. This was valuable, raising awareness this was not just a single union initiative, but a pan union perspective. Wales TUC staff shared examples of other agreements and projects taking place. It was valuable to have the perspectives of other projects taking place” Manufacturing Company

- 7.58 A number of the employers engaged in the research highlighted that they had attended Wales TUC organised events. The feedback was largely positive.

“Having attended the ULR events and Stakeholder Conferences, the organisation has now signed up 23 ULRs in the organisation. The organisation has also used a presentation from Wales TUC to encourage ULR recruitment” - Manufacturing Company

“Wales TUC seminars were very valuable, allowing different organisations to network, share good practice and establish partnerships in running courses/ensuring employees can attend particular courses. Wales TUC ensure expert speakers present, attendees can then report back to their workplace and discuss how this could be adapted in the workplace” - Manufacturing Company

- 7.59 Wider references from unions engaged in the research are included below:

“The first learner agreements were signed in 2010, and at the time Wales TUC encouraged these. Follow up revisions tend not to include involvement of Wales TUC”

“The learner agreement would not have been produced as quickly had it not been for Wales TUC support”

“Wales TUC provided support in setting up learner agreements during contract meetings. They were instrumental in bringing all sides together, providing specialist support. This was essential in getting the project off the ground. A Workforce Development strategy was put in place. This contextualised the development of the essential skills training in correspondence with the business requirements”

“Employers can be more responsive to a Wales TUC Development Officer as they can bring in knowledge, statistics and data to give an employer a broader understanding of the programme. They can also potentially address a number of issues”

“(Wales TUC) Development workers have attended meetings between WULF Project Manager and employers to establish the learning agreement. They acted as a mediator ensuring employers understand the value”

“Wales TUC available to provide further support completing agreements. Support providing for wording agreements and examples of good practice from prior agreements are shared. Agreements have been particularly important in negotiating time off for learners”

“They provided pro-formas to write learning agreements, which was very useful in putting this together. Learning Services Development Officers play an intermediary role between employers and unions in putting these together, recommending the inclusion of policies”

“There is currently only one training officer in the whole of the UK for the union. Therefore Wales TUC played an essential role in providing support”

- 7.60 Our research has established a minority of unions that were unsupportive of the role of Wales TUC. For example, one union did not believe Wales TUC had sufficient knowledge about workforce development strategies or learning agreements. There is a weight of evidence to the contrary. The wider evidence collected and analysed is clear in that Wales TUC provided added value in their support to the majority of unions interviewed.
- 7.61 As referenced previously the demands for learning agreements across different unions and workplaces varies significantly. The ‘pick and mix’ approach enabled Wales TUC resources to be targeted where it was most needed. Wales TUC delivery staff were highly regarded in terms of expertise and adaptability.

### **Networks of Excellence**

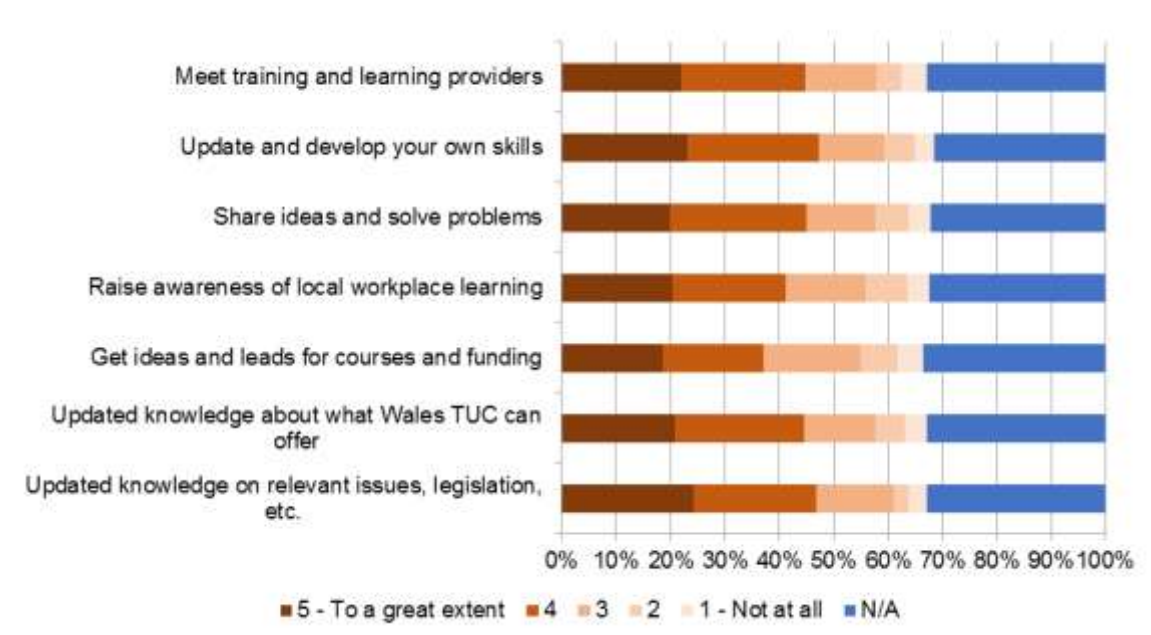
- 7.62 This section of the report identifies the impact of Wales TUC supporting and managing the Networks of Excellence to provide a platform for ULRs to identify training opportunities, share good practice and build relationships with stakeholders on a local level. This section also covers wider activity aimed at contributing to such aims, such as Net News.
- 7.63 The aspiration was for the Networks of Excellence to act as a one stop shop for ULRs to access training and learning products and to share information. In the Business Plan 2010-13 the responsibility was initially with Education Services but this subsequently was delivered by Learning Services.

- 7.64 The meetings were an opportunity to share information around the learning ULRs were involved in, within their own workplace. A key aim was for ULRs to understand the wide opportunities available for learning in the workplace, and how they can play a role encouraging individuals to sign up for ESIW courses or other courses available through providers.
- 7.65 Key stakeholders attending network meetings included WULF Project Managers, independent training providers, colleges, universities and additional organisations with a connection or interest in union learning/adult education. In summary, the meetings continued to attract the desired audience across the 2010-13 period. This in itself is a strong indication that the meetings were well regarded.
- 7.66 In total, more than 60 per cent of ULRs considered the Networks of Excellence an effective resource across each of these areas, providing a useful opportunity for meeting training and learning providers, to update and develop your own skills and share ideas and solve problems.
- 7.67 Four cohorts of regional Network meetings were held annually from 2010-2013. During each of these cohorts, four or five corresponding meetings were ran alongside one another at multiple locations spanning across Wales. Attendances at each of the events ranged from less than 10 ULRs up to 30-35, with larger group meetings taking place in North and South Wales. In total between 70 and 100 ULRs were in attendance across corresponding events within each cohort.
- 7.68 When appropriate, meetings were organised to link with other organisations and events to maximise the resources of ULRs and the Wales TUC. Information on all new relevant initiatives or schemes was fed into the meetings as this became available. Networks of Excellence meetings were undertaken in community venues, theatres, libraries, colleges and workplaces, ensuring costs were kept to a minimum and that there was good accessibility for attendees.
- 7.69 Agendas for Networks of Excellence meetings included a range of relevant presentations, providing information on a range of available educational courses, policy information, job opportunities and further available resources for ULRs. Each meeting incorporated different speakers and briefings and focused across a variety of agenda items.

- 7.70 The meetings themselves also provided opportunities for several ULRs to chair the meetings, initially for three or four meetings then on a one meeting basis. ULRs have also contributed to briefings and in some meetings led the skills sessions.
- 7.71 The morning sessions of the network meeting provided opportunities for engagement between ULRs, training providers and WULF Project Managers. By contrast, afternoon sessions were specifically ULR focussed, including briefing and workshop sessions delivered by Education Services, with a focus on upskilling ULRs in their role and sharing good practice. Sessions were delivered by Wales TUC staff, provider tutors, key speakers and ULRs.
- 7.72 There was a huge range to the content of sessions, a snapshot of which are included below:
- Higher Education funding changes and free learning apps presented by the Open University in Wales
  - Essential Skills Briefings
  - Online Learning ran by JISC RSC & Open learn Champions
  - Employment Support Services
  - The Elevate Programme (full and part-funded leadership and management courses in the workplace)
  - Workshops on Apprenticeships
  - Briefings from ADT on the Employer Pledge
  - Briefings from Mind Cymru on Mental Health in the Workplace
  - Information around Learning Agreements
  - The Climbing Frame
  - Time to train legislation
- 7.73 The number of learning providers attending the meetings gradually increased throughout the 2010-2013 programme, as the value of the meetings became more widely understood. By attending the Networks of Excellence events providers had an opportunity to publicise their learning offer. Wales TUC acted as a gatekeeper to ensure that only those learning providers with a positive offer, likely to be of benefit to unions, employers, WULF Project Managers and ULRs were invited.
- 7.74 There was opportunity for ULRs to discuss the current and future prospects for learning taking place within different workplaces, sharing experiences with others, which led to an exchange of best practice.

- 7.75 Support from the networks was seen as vital for the retention of ULRs, to ensure appropriate support networks were in place and for ULRs to gather as much information for their role as possible. Without a broader network of support ULRs there was a risk that many would have felt isolated.
- 7.76 Our survey of Union Workplace Representatives identified the extent to which Wales TUC events, conferences and seminars supported them to deliver their role. Figure 7.5 shows the key findings.

**Figure 7.5 – To what extent did Wales TUC events, conferences and seminars support Union Workplace Representatives in the following areas (n=337)**



Source: ERS Union Workplace Representative Survey 2015

- 7.77 Over 40 per cent of representatives felt the Wales TUC events had been supportive in allowing them to meet with training and learning providers, to update and develop their own skills and to share ideas and solve problems. It is important to clarify that the views expressed above cover a wider range of activity than just the Networks of Excellence.
- 7.78 As with other strands of activity not every union interviewed felt able to respond to particular questions on the Networks of Excellence. However the majority could and most reported that activity had had a positive effect.



7.79 This is reflected in a summary of quotes below.

“Networks of Excellence are seen as vitally important and should be highly commended”

“It is welcome that they travel across the country to ensure access to all. Reps can't always attend due to release time from work, but overall very useful”

“Networks of Excellence meetings take place at different locations around the country to ensure this is accessible for ULRs/local providers”

“The Networks of Excellence are brilliant, a very useful source of information for ULRs. ULRs can share best practice and meet with new local training providers and colleges”

“A fantastic initiative and a useful repository of everything happening for Trade Unions in terms of learning opportunities”

“It is also useful to integrate with other ULRs. This is a good networking opportunity for ULRs when they can get released from work to attend”

“Very valuable with three meetings a year in different parts of Wales to ensure wide accessibility”

“Local providers attend and can provide workshops to give tasters around new course provision”

“At meetings ULRs are invited to attend other courses, including Mental Health Sessions”

“An opportunity to share best practice and learning across different projects. This was very important for networking”

“It's encouraging to see what else of going on across the sector, good practice taking place and the support available for you. Sharing best practice led to an improved awareness for what was going on within other projects, highlighting how successes and issues have been encountered and how issues have been dealt with and reduced”

7.80 The Networks of Excellence meetings were well received and highly commended by partners. The meetings provided an important opportunity for ULRs from different workplaces and unions to meet with one another and reflect on engaging with union learners and management within organisations.

7.81 Networks between ULRs also supported with developing relationships across the different Unions. In short, the meetings provided a valuable opportunity for ULRs to meet ‘useful’ people in one place, particularly when facility time was limited.

7.82 Our research identified support for the wider programme of events, seminars and conferences delivered by Wales TUC.

“ULR network meetings are very valuable, to discuss best practice, giving ULRs the confidence to discuss particular issues over the lifetime of the project and consider possible solutions. Wales TUC organises an annual conference, in either North or South Wales, to ensure accessibility for as many individuals as possible”

“Learning Services been vital in continuing to support ULRs via literature and conferences. The need to offer support on a regular basis, using a number of mechanisms is important to retain ULRs”

“Events, such as the Gift of Learning and the Wales TUC annual conference are highly regarded in terms of offering support to ULRs and union learning staff”

“ULR conferences and network meetings seen as very valuable”

“ULRs could attend Essential Skills seminars held in north and south. Development Officers can provide on the ground support in north and south Wales, always available for ULRs to meet with and for WULF Project Manager to speak to”

“The ULR network is very important and the conference is useful in developing relationships between Unions and sharing good practice and other activities taking place. This serves to motivate people”

7.83 As a result of the networks, a number of organisations worked in close partnership throughout the 2010-13 period to share courses, providing additional flexibility of participants to ensure course spaces were filled and therefore more viable to run.

7.84 The networks established, drawn together through the Networks of Excellence, ensured cohesion between WULF projects across Wales. Despite the different focus of the projects, there was value in sharing best practice and understanding the approaches taken within other projects.

- 7.85 For WULF Project Managers, attending Networks of Excellence meetings has been extremely valuable for discovering different avenues of support, and possible funding opportunities, linking with the broader sustainability of projects. ULRs also fed back to WULF Project Managers on the learning from other projects taking place across Wales, highlighting project successes and solutions to particular issues, informing project development going forward.

### **Net News**

- 7.86 Net News was an e-bulletin that was circulated on a monthly basis during 2010-13. Net News was circulated to ULRs, training providers and all other parties interested in Union Learning who sign up to receive the publication. Circulation widened gradually over time, to include a broad range of training providers and a variety of other organisations interested in learning. The number of recipients receiving Net News had risen to 650 by the end of the 2012-13 period.
- 7.87 A vast array of information was incorporated in Net News, including:
- Issues raised at the Network meetings;
  - Information on job vacancies;
  - Additional offers available for individuals in the workplace – World Book Night Free books offer;
  - Information on upcoming courses, including TU residential weekend courses;
  - Information of learning events and campaigns; and
  - Information on available courses, events, seminars, briefings, conferences and reports.
- 7.88 The feedback to Net News from WULF Project Managers and unions was largely very positive.

“The newsletters (Net News) are also really well received”

“The newsletter is very valuable. We can be alerted to the progression of other projects and opportunities throughout Wales. For example, if we required a venue in North Wales, the Development Officers have local knowledge in place and are always enthusiastic to help”

“Net news includes wealth of useful information”

“Net news was extremely valuable for sharing information”

“The newsletter has useful information on free courses and projects taking place elsewhere (useful for finding new training initiatives). This could be circulated more widely by officers in other parts of the country”

- 7.89 Union Officials felt it had been particularly valuable to understand the progression of different projects across Wales, to understand both the wider opportunities through training provision and hear about examples of good practice. The publication also ensured course information was widely distributed to ensure wider learning could take place for employees across a variety of workplaces throughout Wales.

## **8. Support for WULF Projects**

### **Introduction**

- 8.1 A significant proportion of Learning Services staff resource was directly focussed on supporting WULF Projects. The support across unions and to each WULF Project Manager and workplace varied considerably due to the specific needs and demands.
- 8.2 Learning Services were often the first point of support for WULF Project Managers. There was significant variation in the level of support provided. Whereas some WULF Project Managers made contact with Learning Services on a daily basis, others worked more independently.
- 8.3 In short, Learning Services provided flexible support where it was needed, and not where it wasn't. Learning Services understood the management requirements for delivering WULF and as such were able to identify WULF Project Managers who needed support in the initial stages of delivery.
- 8.4 We have interviewed a wide range of unions and WULF Project Managers to ascertain views on the added value of Wales TUC support. We also identified a number of areas of improvement. It is worth highlighting at this stage that the support was generally highly regarded, particularly by those unions who were new to WULF from 2010 and by many of the WULF Project Managers that were new to the role.
- 8.5 Our research has identified that a number of the larger unions would have welcomed more information on the outcomes and objectives to be achieved through the WULF activity. From their perspective they witnessed plenty of diverse and largely reactive activity but did not see what this intended to achieve.
- 8.6 Simply put, there was a demand for closer working between such unions and Wales TUC at a senior level. We are surprised at this given the communication from Wales TUC, including reporting regularly on progress to the TUC General Council, and the frontline exposure of Learning Services' staff.

## **Supporting the Development of WULF Project Managers**

- 8.7 Each successful WULF Project was offered a project management support visit as soon as the Project Manager was appointed. Training for WULF Project Managers had become increasingly important as a number of WULF projects became more strategic, sector based and Wales wide during the 2010-13 period. We know from our primary research that many WULF Project Managers valued the support, particularly those that were most recently recruited to the post. The support enabled WULF Project Managers to better understand what the role entailed and how it could be best approached from the outset.
- 8.8 Well trained and effective WULF Project Managers were important if learning cultures were to be embedded and engagement in WULF Projects (employers and employees) was to be achieved. It was evident that this was recognised by Learning Services in the development of the agreed Business Plan 2010-13. Our research revealed that less experienced WULF Project Managers and wider union officials agreed that the WULF toolkit provided a wealth of useful information, including a number of useful guidelines, templates and contact links.
- 8.9 The Toolkit had also assisted with report writing for monitoring forms. Officers trained WULF Project Managers to undertake appropriate reporting and ensured information required for auditing was available. This included the reporting of claims, financial recording and any additional evidence. Pre-existing WULF Project Managers were far less likely to undertake the training opportunities, whereas less experienced staff, including first time WULF Project Managers, were generally supportive of the training received.
- 8.10 Learning Services also supported unions without WULF projects in developing workplace learning initiatives. Both re-engaged workplaces and new workplaces, including those eligible for WULF funding, were identified for union-led learning development. New approaches or re-engagements were made at 42 workplaces, which exceeded the Wales TUC annual target by 20 per cent.

## **Developing WULF Project Bids**

8.11 Learning Services had a role providing advice and guidance to unions seeking to bid for WULF funding. Our research identified that for a number of unions Learning Services played a crucial role supporting the development of a number of successful WULF project bids. Key activities included:

- Ensuring bid objectives aligned with Welsh Government requirements, whilst ensuring budgets were appropriately developed;
- Guiding projects as to how and where budgets could be spent;
- Checking all new bids prior to submission to the Welsh Government to ensure they were complete;
- Supporting unions to better understand the practical needs of the workforce in developing WULF project bids, providing an understanding of the local context across workforces. For example this included ensuring that evidence of need was incorporated into bids, for example, in the context of an ageing workforce; and
- Ensuring strategic Welsh Government policy was incorporated into the WULF project bids.

8.12 The Welsh Government recognised the important role Learning Services had on developing WULF bids. In particular, they guided some unions through the process and established an important link between Welsh Government strategy and union values.

## **Facilitating Partnership Working in WULF**

8.13 Wales TUC recognised that the delivery of WULF projects in isolation would not embed workplace learning cultures in the long term, so sought to coordinate engagement between WULF projects to maximise funding and seek long term sustainable solutions to continue the workplace programmes. Added value was achieved through signposting employees from multiple workplaces to providers with free places on offer. The signposting role ensured enough employees were present for the course to run, meaning workers could attend training courses, while ensuring value for money for course provision.

8.14 Learning Services also collected reports from WULF projects and supported projects to work collaboratively with other unions. A number of unions and WULF Project Managers highlighted that without the role

of Wales TUC in place the activity would have been less effective and less efficient.

- 8.15 Wales TUC brought a level of consistency to the projects and provided feedback to Welsh Government in a systematic and comprehensive manner. Without Wales TUC performing this role then the work of the Welsh Government to understand what was being achieved and how would have been much more intensive.

### **Facilitation, Coordination and Dissemination via WULF**

- 8.16 Included below is a summary of the typical activity undertaken by Wales TUC:
- Facilitated WULF Project Steering Groups and coordinated activity e.g. WULF Projects could involve 20 partners and Learning Services had an important role establishing and managing relationships across partners;
  - Supported a forum for WULF Project Managers to encourage the dissemination of good practice and information;
  - Worked closely with WULF Project Managers to develop learning centres in workplaces and encouraged employees to take part in learning via ULR links;
  - Presented at Employer Forums on the benefits of union-led learning at the request of unions;
  - Attended open days to support WULF Project Managers generate further interest for particular courses;
  - Organised annual stakeholder conferences to engage employers with WULF, showcasing the impact of both current and previous projects in the workplace;
  - Initiated celebration events that shared success stories across different WULF Projects, reflecting on successful aspects of learning provision. The events also gave employers a chance to hear reflections from employees who had undertaken particular courses.
- 8.17 The WULF Project Manager Meetings were particularly valuable for sharing good practice and discussing common challenges across projects, enabling networking opportunities across projects. WULF Project Managers believed the Steering Group meetings allowed unions to meet and raise awareness of different WULF Projects.



There was an opportunity for WULF Project Managers to promote the different avenues of training on offer, to benefit employees.

- 8.18 A number of Project Managers and Union Officials felt they had a good understanding of the progression of other WULF projects as a result of this. Quarterly WULF Project Manager Meetings were largely regarded as useful mechanisms for sharing information and good practice across other WULF projects. Our research has established that the network was particularly valuable for the less experienced WULF Project Managers. It also identified, albeit from a minority of views, that sharing of good practice from other parts of the UK had been less common and could be improved in the future.
- 8.19 Learning Services also worked with WULF Project Managers to support the production of annual reports, including year-end evaluations for NAPO, BFAWU, GMB, ASLEF, USDAW and Community during the 2012-13 period. This ensured a degree of consistency across reporting, and ensured that learning was recorded in an effective manner, to inform future activity.
- 8.20 Learning Services often took the role of a critical friend to question and challenge WULF project managers. They also provided insight from previous projects they have worked on, for instances where particular approaches have worked effectively in the past.

### **Supporting Provider Intelligence to WULF**

- 8.21 Learning Services had considerable understanding of the landscape of providers across different parts of Wales. We know this based on interviews with unions, WULF Project Managers, ULRs and a number of employers. They understood which providers engaged workers through an interactive and flexible approach and were therefore well placed to offer guidance to WULF projects.
- 8.22 Included below are a number of comments reflecting the general support for the approach.

“WULF Project Managers receive updates on legislation/essential skills provision to provide an understanding of the national picture, whilst meeting with localised agencies and providers to understand the opportunities available locally. ULRs report the value of this in learning new ideas and ways of working from others”

“Important in sharing learning across WULF projects. Learning providers attend and offer workshops, enabling WULF Project Managers and attending ULRs to understand what might be relevant for employees”

“Wales TUC updates on policies and programmes emerging nationally, ensuring this is relevant for the WULF projects”

“WULF Project Managers were also invited to Networks of Excellence meetings and have opportunity to share good practice. Useful top tips and also provided. This is also very valuable for signposting to different avenues of support”

“This is very useful for the signposting role of ULRs, to share experiences and feedback. Networks of Excellence provide valuable opportunity for ULRs to meet, share good practice and feedback the WULF project learning from others across Wales”

- 8.23 Learning Services also offered advice on providers working within very specific areas of provision. Through established relationships with providers across Wales they provided impartial introductions to both unions and employers. A number of unions interviewed recognised Learning Services as the first point of call for identifying credible providers. The local knowledge of Learning Services staff meant they could also recommend local providers to deliver courses in particular localities.
- 8.24 Our research with unions identified a minority view that Wales TUC as having a recognised understanding of strong training providers offering generic training provision but were less well regarded as having less knowledge of more specialist niche providers. For instance, smaller unions (e.g. BECTU) had established relationships with specialist providers, who had experience working with atypical workforces, including many who worked freelance. These unions functioned in a different manner, supporting individuals rather than operating within workspaces. Other smaller unions sourced learning providers delivering very specific learning provision. In summary, Wales TUC provided support where it was needed.

## **Engaging Employers**

- 8.25 In order to embed sustainable learning cultures within workplaces it was essential to engage employers. This was undertaken via a number of methods in response to the circumstances and characteristics of each employer and the capacity of unions active in such workplaces.
- 8.26 Approximately half of employers interviewed as part of this evaluation study were aware that Wales TUC had supported the roll out of individual WULF projects. This study is not an evaluation of the WULF programme. Our role is to try, with the data and information available, to assess the golden threads that exist between the impact of WULF projects and the Wales TUC activity. We sought to achieve this by:
- Firstly, understanding the scale of the activity undertaken by Wales TUC;
  - Secondly, assessing the views of WULF Project Managers, unions and employers on this activity;
  - Thirdly, understanding what the impact has been, and the additionality created through Wales TUC activity.
- 8.27 Initially Learning Services engaged with the unions to understand the workplaces where employment conditions were suitable. On occasion, unions had approached Wales TUC to recommend engaging with particular employers. Depending on the relationship with union Full Time Officers, Learning Services were provided with a list of employers to approach directly. On other occasions, Learning Services identified unionised workplaces to approach.
- 8.28 Between 2010 and 2013 Learning Services mapped the major anchor companies in Wales. Approaching large employers had been appropriate given the finite resources available and the potential impact on a significant number of employees.
- 8.29 Our research involved interviews with employers about their involvement in the WULF projects. It is important to highlight that we were particularly interested in how Wales TUC had added value. We know that Wales TUC have contributed to the shaping of particular WULF bids to a greater or lesser extent but it is testing to understand their precise contribution to this and how this has added value from an employer perspective.

- 8.30 The number of employers consulted on a one to one basis through this research was relatively small in comparison to the total number of employers engaged in WULF projects. We therefore need to be mindful of drawing conclusions from this data we did find that those employers that recognised Wales TUC as part of the WULF project set up, and that rated the support from Wales TUC were also much more likely to highlight the positive benefit of a WULF project to their workforce.
- 8.31 The views of employers varied considerably, in terms of access to WULF Project funding, need for WULF funding, how that funding was used and the overall benefit to employees and themselves as the employer.
- 8.32 Our research with employers identified a number of ways Wales TUC had engaged with employers during 2010-13. The majority of the employers engaged in this research were larger employers, many of which had some infrastructure in place and a degree of commitment to employee learning.
- 8.33 There is evidence of the added value of Wales TUC (and the impact of activity generated) in engaging with employers. A number of employers became aware of WULF via Learning Services Development Officers. Our research also identified a large employer that only got involved with WULF due to a ULR connection, and the impact of activity has since been significant.
- 8.34 Our research highlighted a variety of ways that Wales TUC has engaged and added value to employers. This included :

“Working in partnership alongside trade unions to set up an Essential Skills programme in the workplace”.

“Wales TUC was active in WULF project delivery. The Wales TUC Development Officer played an important role in maintaining the budgets, informing how and where the budget could be spent, and setting up the project”.

“Wales TUC supported with putting together employee development plans. Our company didn't have capacity to do this”.

“Wales TUC provided bullying and harassment training across the organisation. Wales TUC Education Services developed this programme, and Learning Services could source funding available for this training and any additional training across the organisation”.

“They could inform the company and the WULF project manager of other training or funding available”.

“Wales TUC provided vital signposting, value and support”.

“They supported our organisation in gaining access to the WULF funding”.

“They did help arrange course providers. Managers engaged with staff to see what they wanted to get from the course”.

“Wales TUC is fundamental to the foundations of building blocks of all training, through a role in partnership development, brokering, networking and opening doors for different organisations. Without the Wales TUC we wouldn't have access to the valuable learning experiences of other organisations”.

“Wales TUC gave support by looking at the funding element. Some members of staff didn't have formal qualifications. Wales TUC showed them how to access IT training provision. Staff members were encouraged to do so through the union, who also helped introduce ULRs into the workplace”.

“Staff were very enthusiastic and wanted to support us with further funding opportunities”.

“Wales TUC worked closely with the training provider, supporting the development of course content”.

“They helped engage customers in the courses”.

“Wales TUC were involved on the WULF Steering Committee and provided guidance for the project”.

- 8.35 It was evident that a number of employers engaged directly with unions rather than through Wales TUC. This aligned with the Wales TUC approach of ‘we are here if you need us’, a way of working that ensured that staff resources were targeted upon areas where support was most required.

### **Promoting Awareness of Funding Streams**

- 8.36 Learning Services sought to ensure that WULF Project Managers were aware of any additional funding opportunities available to support the further development of WULF provision. For example:

- WULF projects were informed of the Workforce Development Fund, a Welsh Government strand of funding for manufacturing organisations;
  - IT/Aircraft Industries were made aware of additional European Funding available to them;
  - Information on vocational courses, apprenticeships, Higher Education courses, etc. delivered through Cardiff University, along with Further Education courses, which WULF Project Managers would be otherwise unaware of.
- 8.37 Our research revealed that unions and WULF Project Managers recognised the important role Learning Services played providing information on newly established funding streams in learning and education.

### **Joint Union Working**

- 8.38 In 2009 Estyn published a report called the 'Evaluation of the quality and value of the education and training funded through the Welsh Union Learning Fund'. This identified improvements in how the Welsh Government and WULF project managers could maximise the value of the learning afforded through WULF funding. The report recommended that Wales TUC should improve partnership working across unions to enable them to effectively share good practice and resources.
- 8.39 To a large extent this has been achieved not as a stand-alone objective, but as a cross-cutting theme of the Business Case 2010-13. For example, the Networks of Excellence, alongside the range of workshops and conferences, have been useful in sharing good practice and resources. In addition, wider opportunities to deliver joint training across unions has been implemented, often facilitated by Wales TUC Learning Services staff.
- 8.40 Development Officers also played an important role in identifying opportunities for coordinating projects and learning provision across unions to better support workers.

### **Liaison with Welsh Government**

- 8.41 Based upon interviews with unions and the Welsh Government it is evident that Wales TUC, via staff funded through the 2010-13 contract, played an important role as a funnel of WULF information from unions to the Welsh Government, and vice versa.

- 8.42 Learning Services worked collaboratively with the Welsh Government to review the WULF prospectus and accompanying documentation prior to publication, ensuring that the Prospectus design reflected the collective view of unions was considered. This filtered approach saved considerable time for both the Welsh Government and individual unions.
- 8.43 Learning Services had an important role supporting the administration of WULF Projects and ongoing liaison with the Welsh Government i.e. in collecting and analysing information arising from WULF Project evaluations and providing the Welsh Government with a quantitative summary of such evaluations. This contributed to the effective monitoring of the whole programme and streamlined reporting, reducing the burden of unions and the Welsh Government. Wales TUC also attended every quarterly contract meeting between Welsh Government and WULF Project Managers, to support the discussion and ensure contracts were continuing to progress in an effective manner.
- 8.44 There was considerable benefit to the Welsh Government, alongside the unions, of having this overarching resource, providing consistency in approach across the WULF programme. This was seen as particularly important for those unions with less direct experience in managing WULF Projects pre-2010.
- 8.45 Wales TUC was regarded as a valuable route to engage with the Welsh Government, especially on emerging issues that require action. For example Wales TUC was able to positively influence the payment conditions for WULF Projects, and coordinated discussions around the monitoring of contracts during the initial phase of development, thus ensuring that auditing procedures were undertaken thoroughly and remained practical across the projects. The Welsh Government recognise the unique position of Wales TUC as a vital stakeholder in the delivery of WULF projects. It is difficult to see an organisation other than Wales TUC performing this role.
- 8.46 Our research revealed that a number of WULF Project Managers recognised the important role of Wales TUC as a link between unions and the Welsh Government as the contract manager for WULF. For example, they played an important role resolving any issues and ensuring projects ran effectively for the benefit of employees, whilst communicating to the Welsh Government what was working effectively on the ground for each WULF project.

“Without the Wales TUC, the unions would not be able to negotiate directly with Welsh Government. Unions have this opportunity to put forward particular issues to Wales TUC to address with Welsh Government. Unions are also informed of changes in national policy and changes to national programmes. Having a national body to communicate with Welsh Government very important”

“WULF Project Manager meetings are very valuable in sharing good practice. Wales TUC provided an essential role as the body working between our union and the Welsh Government. They provide a vital communication link, providing a union perspective to the Welsh Government”

### **Maintaining Momentum**

- 8.47 The establishment of workplace learning committees was core to ensuring the sustainability of learning when WULF projects came to an end. For example Learning Services assisted Unison; UCATT; FBU and Unite in making sure unions supported ULRs to become more autonomous in their own workplaces. Support for sustainability of activity was extended to employers. For example, a number of employers received advice on investing in the professional development of ULR's, to enable them to broker learning with individual providers and continue to support learners within their own workplace.
- 8.48 Evidence from the quarterly reports demonstrated how Wales TUC assisted unions in maintaining learning provision beyond the availability of WULF funding. For example, Learning Services supported Education Services in the provision of evaluation training to WULF Project Managers, alongside wider advice and support to unions and employers on sustaining levels of learning. Following the cessation of the 2010-13 WULF programme we understand that many of the WULF projects were rolled forward into new phase WULF projects, therefore continuing the momentum.

### **Stakeholder Views on Areas for Improvement for WULF Support**

- 8.49 Our research has identified a number of areas where stakeholders believed support could have been provided. It is important at this point to make it clear that this section includes comments from only a minority of the stakeholders consulted, however it is still important that these are raised and considered.



- 8.50 We have found a degree of variation for the level of ongoing support to WULF Projects. Support ranged from ongoing mentoring support, to forwarding on useful contacts and signposting. There was no 'one size fits all' approach to working with WULF Project Managers from the different unions. The employers and workforces engaged in the projects also vary significantly, with variation within individual WULF projects.
- 8.51 On the basis of our interviews the majority of unions consulted understood the offer and accessed support based on their own requirements. The 'pick and mix' approach of Wales TUC responding to gaps in union capacity and capability has largely worked well.
- 8.52 For many of the comments received there was a much larger body of evidence that Wales TUC had delivered in this area. This included the issues below:
- The scale and scope of support was less that it should have been
  - Wider dissemination about non-WULF Projects would have been useful
  - Wales TUC could have better supported the negotiation of training contracts
  - Wales TUC could have put projects in touch with others and facilitate sharing of best practice and resources.
  - Wales TUC could provide more in the way of resources to support the WULF Project Management and project progression.
  - There has been no support for ULRs
  - WULF Project Manager wasn't directed to any further training.
  - Wales TUC did not search for opportunities of additional courses for our project to link in with.
  - The website was inadequate in terms of the resources and information available e.g. it would have been useful to have provider sector links and perhaps more information on better apprenticeships.
- 8.53 Whilst we are confident in our assessment that overall the above issues were limited to the experiences of a minority of partners, they provide a valuable reminder to Wales TUC to continue to focus on the above issues.

## **9. Wider Learning Services Activity**

### **Introduction**

- 9.1 This section of the report assesses the extent that Learning Services has delivered upon the specific wider objectives of the agreed Business Plan 2010-13, namely:
- Redundancy support activity
  - Delivering the TUC Quality Award
  - Working with Sector Skills Councils
  - Engaging with a wider range of stakeholders, at a strategic and operational level, to develop and improve adult learning in workplaces
- 9.2 It is evident from reviewing the quarterly update reports alongside wider interviews with Wales TUC and wider stakeholders that the breadth of activity has been diverse across the three year evaluation period. Often this has included intensive work over a period of months alongside many, many short interactions.
- 9.3 We need to reiterate at this point that the Business Plan 2010-13 was largely assessed via quarterly reports to, and quarterly meeting with, the Welsh Government. Our intended approach has been to firstly cover whether Wales TUC delivered activity as intended and secondly what the impact has been.
- 9.4 As mentioned previously, we have not been able to consult with the range of stakeholders required to inform the answers to these questions e.g. representatives from each Sector Skills Council, employer representatives for those assisted by Wales TUC with redundancy support, etc. This has limited our capacity to evaluate the impact and any additionality. Our approach has therefore relied upon an assessment of the plausibility that such activity will have impacted upon the intended outcomes.

### **Partner and Stakeholder Engagement**

- 9.5 This part of the report reviews the scale and scope of Learning Services engagement with strategic partners and stakeholders to support the delivery of the union led learning model during 2010-13. The need to be outward looking to gather intelligence, network and

build relationships that could add value to the model of delivery was, and remains, critical.

- 9.6 The opportunity to influence policy and practice was a key part of Wales TUC activity and representation on partner bodies and wider partnerships was recognised by Learning Services as a key mechanism to achieve this. For example, Wales TUC lobbied for a rebranding of the programme from Basic Skills to Essential Skills in the Workplace. Learning Services believed this rebranding led to greater numbers of individuals and employers becoming involved in the programme than may have otherwise been the case.
- 9.7 Other examples of representation on partner bodies include Basic Skills Strategy Monitoring Groups, Skills Strategy Monitoring Groups and Wales Skills and Employment Stakeholder Forum. In addition Learning Services was represented upon the Strategic Group of NIACE Cymru, facilitating engagement with unions to promote and support delivery of the NIACE Learning at Work Day at unionised workplaces. Wales TUC highlighted that this was a valuable vehicle for learner engagement. They also engaged with, and publicised the activities of, a range of stakeholders in relation to learning across a number of themes, including mental health, dyslexia awareness, housing, disability etc.
- 9.8 Given the close working relationship between Wales TUC and employers there was a clear benefit of each Sector Skills Council (SSC) engaging with Learning Services as they could provide a streamlined route for SSCs to access workplaces via a joint approach with the relevant union. It is worth raising at this point the fact that the role of SSCs has changed significantly since the start of 2010. Very few SSCs continue to have a Welsh presence and it has not been possible to consult with SSC representatives about their involvement with Wales TUC from 2010-13.
- 9.9 During the 2010-13 period Learning Services:
- Coordinated engagement with unions in SSC strategy development;
  - Continued to work with individual SSCs and unions to implement action plans;
  - Engaged with a number of SSCs, including Skills for Logistics and Summit Skills to support specific learning activities. This included advising on new funding systems, development of

apprenticeships and open forum discussions with employers;  
and

- Organised bi-monthly meetings with certain sector clusters to maintain continued engagement.

9.10 We need to be clear at this stage as to the remit of Wales TUC in relation to assisting the Sector Skills Council during 2010-13. The inclusion of this objective in the Business Case 2010-13 was the main addition from the Welsh Government. It is important at this juncture to mention that engagement with Sector Skills Councils may not have permeated beyond a small number of people within any union or employer. This is especially true in employers interviewed who overall were found to have limited knowledge of Wales TUC facilitated (or other) SSC activity in their workplace between 2010-13. We therefore need to be mindful of this in assessing reach and awareness of the SSC in particular organisations.

9.11 Several unions identified benefits to Wales TUC enabling interactions with SSCs.

“Wales TUC encouraged engagement more fully with Skills for Justice. Whilst this always occurred at a senior level, the (new) engagement at operational level with the organisation added weight to what the organisation was trying to achieve in employers”

“Wales TUC put us in contact with Skills Academy for Wales, E-Skills and Skills for Logistics. As a result employees undertook delivery goods vehicle apprenticeships free of charge and an upgrade of HGV licenses for employees was negotiated”.

9.12 Our research identified that some unions already had well established links with SSCs, so there was no role for Wales TUC in such instances.

9.13 Learning Services commenced discussions with unions, employers and SSCs in 2011 to promote the recruitment of apprentices in private sector workplaces across Wales. In order to develop a good practice model for working with partners they worked collaboratively with the Welsh Government to ensure that a partnership approach was achieved. An example of this was the engagement with Skills for Justice in regards to apprenticeship development in the Wales probation service and the justice system. Learning Services also engaged with E-skills with regards to providing opportunities for apprenticeships and ICT qualifications for young people.

- 9.14 In order to develop a good practice model for working with partners Wales TUC worked collaboratively with the Welsh Government to ensure that a partnership approach was achieved.
- 9.15 More widely, Learning Services engaged with a number of organisation to promote apprenticeships including:
- Discussions with the Spatial Plan Energy Sector Workforce Development Group regarding Wales TUC and union support for apprenticeships within oil refinery, LNG and renewable industries;
  - Discussions with ULRs on the potential involvement of ULRs with apprenticeships in the workplace;
  - Discussions with employers to assess the union involvement with their apprenticeship programme;
  - Funding signposting and apprenticeship promotional activities at employers.
- 9.16 There was significant benefit for the SSCs in working with Wales TUC, insofar as Wales TUC facilitated a coordinated pathway into employers via unions. This could not have been achieved an organisation other than Wales TUC have delivered this contract. The involvement of Learning Services encouraged greater joint working with SSCs across Wales during 2010-13. More specifically, the activity facilitated connections at a more operational level, which was beneficial as this is where all of the direct employer engagement happened.
- 9.17 The role of SSCs across Wales has changed significantly since 2013, with a considerable reduction in scale and scope. As such, the legacy of any Learning Services activity though SSC has been curtailed significantly. We simply do not have the evidence to indicate whether the engagement of SSCs with employers (as facilitated by Wales TUC) has had an impact or not as we could not consult with SSCs and employers involved in such activity.

### **Supporting Redundant Workers in Accessing Learning and Skills**

- 9.18 This section of the report identifies how Learning Services supported unions in providing a rapid response to redundancy. We will be clear at the outset that within the scope of this evaluation methodology it was not possible for us to speak directly with those individuals or employers that came into contact with Learning Services redundancy support

activity. This has limited our ability to assess impact with any degree of certainty.

9.19 Across the three years of the contract Wales TUC advised unions and employers concerning the ReAct programmes of redundancy support in Wales. This involved liaison with agencies including Jobcentre Plus, Careers Wales and Basic Skills Cymru to assess the training needs of workers seeking re-training or up-skilling in order to enhance their prospects of securing new employment.

9.20 We also understand from Wales TUC that they had a key role in supporting the smaller scale redundancies that didn't trigger support from other agencies. Support included:

- Providing general advice and guidance but also targeted support such as CV writing, redundancy support;
- Working with unions and employers to find appropriate training provision including basic essential and other transferable skills;
- Negotiating the delivery of a 'redundancy course' through WEA that included essential skills qualifications in order to improve transferable skills for future employment opportunities;
- Working in partnership with unions to attend redundancy events at workplaces;
- Supporting unions in negotiating appropriate release for training to take place and for employees under threat of redundancy to attend job fairs; and
- Signposting workers to Further and Higher Education opportunities.

9.21 In 2011, Wales TUC was approached by Welsh Government to manage a £50,000 fund established by a multi-national business to support the learning of their former employees when they ended operations in Wales. This was effectively a top-up fund to enable redundant the workers to access an additional £1,000 for learning under the terms of the React Programme and administered by Careers Wales. Wales TUC had responsibility for managing the fund, carried out this work in tandem with Welsh Government's ReAct programme and submitted an audit demonstrating that they had fully discharged their responsibilities in respect of the fund.

9.22 The quarterly reports submitted to the Welsh Government identified the scale of the support provided to employers. Overall Wales TUC estimate that during the 2010-13 funding period they supported

thousands of workers at 62 employers (across many more workplaces) between 2010-13.

- 9.23 The recession, twinned with public sector funding cuts as part of the Coalition Governments austerity measures, impacted upon the public, private and voluntary sector. The inclusion of resource to support workers being made redundant within this context was appropriate. However, at the time of preparing the Business Plan 2010-13 it was difficult to plan the scale of the redundancy support required.
- 9.24 The impact, in terms of the additionality of the Wales TUC support, has been difficult to accurately assess with any degree of confidence, due to the fact that support would have been provided at least 2 full years ago, and possibly even up to 4 years ago.

### **Wales TUC Quality Award**

- 9.25 This section of the report assesses how Wales TUC responded to providers seeking the Wales TUC Quality Award, and the impact of such activity. The Quality Award concept, development and initial management was undertaken initially by Unionlearn in England. In 2008 Wales TUC assessed the process and developed it into a Wales specific award.
- 9.26 The Wales TUC Quality Award is awarded to Learning Providers who can best demonstrate their effectiveness in working with Wales TUC, unions and union learners. The Quality Award relates to courses and programmes of study rather than to organisations.
- 9.27 The demand for the award indicates the value providers see in being recognised by Wales TUC. During the 2010-13 time period, recipients of the Quality Awards included:
- The Openings Programme from the Open University in Wales - Awarded in Quarter 2 of 2010-2011.
  - Coleg Gwent – Awarded in Quarter 3 of 2010-2011.
  - The programme of courses at the Trade Union Studies Centre, Coleg Gwent – Awarded in Quarter 4 of 2010-2011.
- 9.28 The role of the Wales TUC was to ensure the award was based on the criteria laid down in the Assessment Guide. The Quality Award was given to programmes and courses that demonstrated stringent good practice criteria with an emphasis for providers to demonstrate how they will work with unions. We know from interviewing TUC Quality

Award providers that it has been an incentive to target work with unions and therefore reach more learners.

- 9.29 Learning providers receiving the TUC Quality awards were added to the list of awardees on TUC Unionlearn website in addition to the Wales TUC learning website.
- 9.30 Periodic reviews continued to take place, with Wales TUC revisiting the four providers during 2011-2012 to ensure quality was upheld. However, particular providers decided not to continue with the Quality Award during this time frame, including the ULR Forum at Neath Port Talbot. During this period, the Quality Award was also provided a page in the course booklet. This served to raise the profile of the award, ultimately seeking to increase the use of those with the award to drive up standards of learning.
- 9.31 During the 2012-13 period, Wales TUC planned to commission research into the demand for the Quality Award amongst Welsh providers, to identify the capacity issues in undertaking the quality award process. The research was expected to inform both the future Wales TUC business plan and the planned timetable of reassessment visits for existing holders of the Quality Award from 2013 onwards.
- 9.32 However, during Quarters 2 and 3 of the 2012-13 time period no significant progress with this objective has been made. This was due to the work of the Networks of Excellence having increased in line with widening membership alongside wider staffing issues. Taking these factors into account a relaunch of the Quality Award was undertaken. Providers with the Quality Award continued to hold the status until plans were finalised and in Quarter 4 of the 2012-13 period a new plan for the Quality Award was put in place, summarised below:
- At the end of the 2012-13 period it was decided the Quality Award would be transferred to Learning Services to be managed by a team of people;
  - Team training was to be provided by TUC;
  - It was decided the Quality Award plan would be updated, with team input into the plan and allocation of targets;
  - Monthly meetings would also take place to monitor progress and support the team through the process; and
  - The Project Officer would work as the coordinator and attend annual national standardisation meetings.



- 9.33 Only a minority of the unions consulted were able to offer a firm view on the value of the TUC Quality Award. The majority of those able to comment understood the value of the status to the provider and those partners looking to commission learning providers. Our research has identified that a number of employers, including a significant multi-national company recognise the Quality Award and importantly this status has influenced their commissioning strategy.
- 9.34 To some extent the value of the Quality Award can be measured by the demand from learning providers. On the basis of information from Wales TUC, the number of providers interested in applying over this time period increased. In 2013 the number of QA holders stood at five. In early 2015 the number had increased to seven and includes four new programmes. Five programmes are at varying stages in the process.

## **10. Alternative Methods**

### **Introduction**

- 10.1 This part of the report considers how the Welsh Government could monitor the impact and the effectiveness of Wales TUC in the future. It also considered whether the Welsh Government could achieve its objective of facilitating work-based learning in other ways.

### **Monitoring and Assessing Future Impact**

- 10.2 During the period 2010-13 the progress made by Wales TUC in delivering the agreed Business Plan was reported via a quarterly report prepared by Wales TUC for the Welsh Government. This document formed the basis of a quarterly discussion meeting to review progress and identify emerging next steps. This approach mainly covered the activity delivered by Learning Services and Education Services.
- 10.3 As part of the contract with the Welsh Government Wales TUC had a number of basic output targets i.e. number of people accessing training. These were not included in the agreed Business Case but in each of the three annual operating plans prepared at the outset of each financial year. Wales TUC did undertake a number of surveys of activity, and wider evaluations as part of associated programmes did provide an indication of the role and value of Wales TUC intervention. However, the impact of this activity (in terms of outcomes) on Union Workplace Representatives, learners and employers was not effectively assessed.
- 10.4 It is only during this evaluation that a more detailed assessment of impact is being undertaken. Even now however, we do not know exactly how many learners, as employees, have been encouraged and supported into training as a result of ULR activity.
- 10.5 We believe that moving forward it is important that assessment moves beyond the quality of the activities delivered and outputs to the actual outcomes achieved. The process of undertaking this evaluation has enabled us to form a view about what the real and tangible measures of success should be.

- 10.6 We believe that Wales TUC, unions, employers and the Welsh Government should investigate the benefits of collecting the following types of data on a more regular basis than that currently undertaken:
- Learner satisfaction with courses;
  - Impact of learning and training on their ability to perform the role as a Union Workplace Representative;
  - Wider benefits at work, at home and in the community;
  - How many more learners have engaged as a direct result of the ULR in their workplace? And what has been the benefit to the individual and their employer?
  - What is the reduction in the accident rate as a result of the Union Health & Safety Representative?
  - How has the Union Equality Representative ensured that equality issues are raised and tackled effectively in workplaces? And what has the benefit been to employees?
  - How many Union Workplace Representatives trained and supported by Wales TUC are unable to deliver the role due to employer restrictions?
  - Satisfaction of unions/WULF Project Managers and employers with the role performed by Learning Services project staff.
- 10.7 We appreciate the challenges associated with gathering this data on a regular basis. As part of this evaluation process we have come to realise the challenge in firstly being able to gather the primary data and secondly identifying the additionality as a result of the programme investment. We also recognise that the monitoring and evaluation systems need to be commensurate with the value of the programme. There is therefore a requirement for the Welsh Government to work alongside Wales TUC in the development of a robust evaluation framework.
- 10.8 Alongside this, or indeed depending on the progress of the emergence of any evaluation framework, we believe a reasonable approach would be to also undertake a broad independent evaluation at the mid-point of delivery. This would serve to assess progress to date on the key impact measures whilst also enabling recommendations on improved practice to be considered for the remainder of the programme and future iterations.

## **Considering Options for Delivery**

10.9 This section of the report considers the degree to which the Welsh Government could achieve its objective of facilitating work-based learning in other ways, and through other organisations. We recognise that the level of funding provided to Wales TUC via the 3 year programme is significant. It is therefore important, in terms of transparency, to consider whether the opportunity to deliver the contract could be widened to include other organisations, regardless or not if Wales TUC had delivered upon the expectations of their Business Case.

10.10 The critical questions to be considered are:

- Could the contract to be separated into a number of smaller contracts i.e. the separation of the management and delivery of Union courses from the wider Learning Services activity, and/or the further sub division of the raft of activities delivered by Learning Services?
- Could another single organisation deliver the contract to the same standard as Wales TUC across the whole of Wales?

10.11 The sub-division of the current contract requirements would lead to a fragmented approach, undermining the coordinated approach to delivery. For example, the commitment to recruiting and supporting ULRs underpins the success programme and is jointly delivered by Learning Services and Education Services and adds considerable value. Splitting the contract would, we believe, likely lead to evaporation of this added value. It would also place additional management demands on the Welsh Government of managing multiple contracts, and potentially be drawn into managing the interface between the contracts.

10.12 In terms of the second bullet point, the key issue is whether there exists a single provider with a track record of delivery against such a diverse contract. The scope of the work delivered by Learning Services remains diverse. At one end it included high level strategic activity aimed at influencing national policy across Wales to the other end of the scale though the provision of one to one support and mentoring to ULRs. We have struggled to identify another such organisation across Wales.

10.13 We also know that overall there is a high level of support from unions to the role of Wales TUC. They already have established networks, relationships and systems in place. Certain facets of delivery support the delivery of other aspects of the service, therefore there is value in delivering any future similar package of support as one contract, rather than several smaller contracts covering, for example, delivery of the Networks of Excellence and/or redundancy support.

10.14 On the basis of our research we believe that Wales TUC is uniquely placed to deliver a contract of this scale and scope in the future based upon:

- Employer engagement is critical to the success of adult learning. Unions are uniquely placed to engage employers and when an employer recognises a union, it has an automatic right to negotiate for learning activity. This could simply not be delivered via a non-unionised organisation;
- They have the existing relationships with a whole range of partners necessary to deliver the role and remit;
- This contract has been delivered effectively, in line with the agreed Business Case;
- Reputation for quality and the important factor of trust;
- Holistic service, working flexibly beyond the accepted margins of the contract to do what is best for employees rather than what is best for Wales TUC;
- Staff are knowledgeable, experienced and well regarded by partners (although we accept that they would be subject to TUPE as part of any new arrangements);
- Learning Services and Education Services are part of the same organisation, ensuring a complementary offer across both parts of the Business Plan, providing significant added value at an operational level;
- We understand that Wales TUC believe they own the rights to the Wales TUC Education courses and as such no other organisation could deliver these units without the permission of the Wales TUC. There is a requirement for the Welsh Government to confirm this, as it will potentially impact upon any considerations to openly procure the service in the future;
- Wales TUC does not make a profit from the contract. In fact, they provide considerable time in kind. We think it is very unlikely that the Welsh Government will receive such an offer from a private provider.

## **11. Conclusions – Findings and Recommendations**

### **Introduction**

- 11.1 Wales TUC contributed, via the union led learning model, to adult learning in Wales. Unions are uniquely placed to engage employers who recognise them as they have an automatic relationship. By upskilling and supporting unions both with and without WULF programmes, Wales TUC contributed towards the fact that learning is central to the activities of trade unions in Wales.
- 11.2 The period 2010-13 was difficult for employers, employees and unions alike. The recession led to significant redundancies. However, Wales TUC was regarded as a constant in a changing environment. Unions largely understand the Wales TUC offer and appreciated where it could add value to their members in terms of the benefits of having trained Union Workplace Representatives.

### **Improving the Performance of Union Workplace Representatives**

- 11.3 Overall, on the basis of the research undertaken and the evidence available the investment in Union Workplace Representative learning has had a considerable benefit to workplaces, but particularly to the employees supported. This is based upon our online survey of Union Workplace Representatives and wider stakeholder consultation. In the absence of further data we are however unable to give a confident assessment of value for money.
- 11.4 Without the support of Wales TUC Learning Services, ULRs would be far fewer in number and much less effective in their role. Many WULF Project Managers would not receive an adequate level of expert advice and guidance and the collective value of union led learning would be greatly diminished.
- 11.5 Our research identified that almost 7 in 10 of all representatives believed that the training and support received during 2010-13 had a significant contribution on them being able to deliver this role. This view is reinforced by wider comments expressed by the representatives via the online survey and from wider stakeholders. On the basis of the data we are confident in concluding that generally the quality of the training was appropriate and has enabled many of those trained to fulfil their representative role in the workplace.

- 11.6 Our research has identified the wider benefits to learners of completing courses. These range from the development of essential skills, increased confidence and propensity to take an active role in wider community activity.
- 11.7 A major issue is the degree to which trained representatives are supported by their employers to actually deliver the role faced by 4 in 10 Union Workplace Representatives. This is a key factor to be considered in the future prioritisation of funding for learning.
- 11.8 Our evaluation has enabled the collection and analysis of valuable and insightful data. There are very clear differences in the views expressed by the different types of Union Workplace Representative, reflecting the requirements of each role. It is recommended that Wales TUC review this to determine how and where improvements can be made.

Recommendation 1: Wales TUC review the online survey data to consider where specific improvements could be made. Survey data could also be used as a broad benchmark against which to compare future performance.

- 11.9 Our research with employers and unions suggests a lack of knowledge within employers in terms of the impact of the Union Workplace Representatives (in terms of staff morale, contribution to productivity, staff retention and recruitment). We suggest that this forms part of further research, especially in light of UK government instigated changes to facility time requirements.
- 11.10 The development of the course content and the way this was delivered evolved, and improved considerably between 2010 and 2013. We understand that since 2013 further improvements have continued to be made. Overall, the survey and qualitative work found that the majority of all representatives believed the course materials to be up to date and fit for purpose. In all, across the Union Workplace Representatives responding, a minority of 5 per cent thought the contrary. Whilst this number is small it is important that Education Services, and partners, continue to assess course content.
- 11.11 The recession had a negative impact upon the number of individuals accessing Wales TUC Education courses. However, the reduction was significantly less market than the rate seen across the rest of the UK. There will be a number of contributory reasons for this.

- 11.12 We believe that the quality and scope of support provided by Wales TUC via the Business Plan 2010-13 is one of the contributory factors but are not in a position to attribute with any confidence the precise scale of this contribution.
- 11.13 The Education Services element of the contract with the Welsh Government for 2010-13 was focussed on the delivery of learning. It is estimated that overall 6,000 separate individuals were trained over the period. Whilst we are confident that they have delivered on the contract, there should be wider interest from the Welsh Government on the analysis of what the trained representatives deliver back in the workplace. For example, we have not been able to identify how many employees have been supported into learning and the personal outcomes achieved as a consequence of ULR activity. Such data would be highly valuable in informing in greater detail what the expected impact of the learning would be in terms of benefit to employers.

Recommendation 2: In any future contract there should be an increased emphasis, and performance measure, on how the representatives support the delivery of agreed outcomes in the workplace. It is important to gain the perspective of employers as to the added value gained from such an approach, so this should be incorporated into any new performance management regime.

### **Essential Skills**

- 11.14 It was evident from our research that the delivery of the Welsh Government's Basic Skills contract post-2010 was regarded as much more effective than the previous contract. In short, Learning Services knew the value of the product to employees and employers and were well positioned to capitalise via the unique position and well established links to unions and unionised workplaces.
- 11.15 Our research with unions and employers indicted that the inclusion of ICT in the essential skills package of support had a significant impact on engaging increasing number of employees in essential skills training courses. This was viewed as a key development in the success of the ESIW programme managed by Wales TUC during 2010-13.



- 11.16 Wales TUC has added value to the delivery of the ESIW programme by engaging different partners to support with wider delivery, with ESIW Project Workers recognising Wales TUC as the only central partner that can engage such a broad range of partners, to ensure collaboration added value. Learning Services had a national overview, with the opportunity to link with other initiatives and broker ESIW training provision across WULF projects, by providing signposting opportunities for joined up working, sharing information on approved providers, sharing resources, sharing instances of good practice and securing additional funding opportunities. This was a firm pillar of the Wales TUC package of support.
- 11.17 In practice, Essential Skills learning was integral to Learning Services activities throughout the 2010-13 period and formed a cross-cutting theme through all of their activities. This was assisted by working closely with Welsh Government and many unions to make Essential Skills provision core to the WULF programme. This critical mass of activity added considerable value.

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| <p>Recommendation 3: The Welsh Government should consider including the delivery of any essential skills delivery programme into any wider contracts to be delivered by Wales TUC.</p> |
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- 11.18 Our research identified the important Learning Services, particularly the ESIW Project Workers, had played promoting the programme, encouraging increasing levels of take up in workplaces across Wales, working closely with unions and employers to raise awareness of essential skills issues, and making employers aware of the benefits the programme can offer. Learning Services worked to embed essential skills provision into the workforce development programmes of employers and as a direct consequence some organisations considered that a culture of learning developed at their workplace.

### **Supporting Union Learning Representatives**

- 11.19 Learning Services had a broad offer for supporting the recruitment of ULRs that could be targeted according to the particular requirements of unions and workplaces. The internal target of 100 new ULR recruits each year was comfortably achieved.

- 11.20 Overall there was considerable support for the approach adopted during 2010-13 from unions and ULRs. Learning Services staff were regarded as approachable and responsive, and the personal contact and benefit of being able to 'put a name to face', encouraged interactions and conversations. The ongoing support Learning Services provided made the ULRs much more effective in all aspects of their role, while ensuring that ULRs were supported, in what can quite often be a challenging role at the workplace.
- 11.21 ULRs believed the training courses and continuing support from Wales TUC between April 2010 and March 2013 was effective in assisting them to support members plan and manage their learning and development. Almost two thirds (65 per cent) responded very positively with either a 4 or 5 rating on the likert scale.
- 11.22 The survey considered how effective support from Wales TUC had been in assisting ULRs in negotiation and support for vocational learning in the workplace. On a 1 to 5 scale likert scale, 60 per cent of ULRs responded positively (with either 4 or 5 rating), indicating Wales TUC support had been particularly useful in assisting the ULR negotiation and support for vocational learning in the workplace. In contrast, 11 per cent of representatives considered the training and support was not at all successful. Again, we regard that this is a positive result of the training and support provided by Wales TUC.
- 11.23 Overall, a significant proportion of ULR respondents felt support from Wales TUC between April 2010 and March 2013 was effective in keeping them up to date with learning opportunities and useful resources, enabling them to support members meet their learning needs (for example, through training courses, Networks of Excellence, Net News, seminars, conferences, etc.). On the 1 to 5 likert scale, over three quarters (77 per cent) of ULRs responded positively with either 4 or 5 rating.
- 11.24 ULRs believed the training courses and continuing support from Wales TUC between April 2010 and March 2013 was effective in assisting them support members plan and manage their learning and development. Almost two thirds (65 per cent) responded very positively with either a 4 or 5 rating on the likert scale.

- 11.25 On the basis of the research undertaken we are reasonably confident that the ULR role has had significant impact on employees through improving levels of motivation, morale and personal development. This view has been informed via the online survey of ULRs and wider qualitative interviews with stakeholders. The opportunity to have captured the views of a much wider number of employees and employer would have assisted in being able to provide a more definite and confident assessment of the scale of the impact.
- 11.26 The majority of unions had positive working relationships with Learning Services during 2010-13. There was broad recognition of the added value in terms of capacity and capability, and recognition of the links between Learning Services activity and the recruitment and retention of ULRs. This is an example of one area where it is beneficial for Wales TUC to continue to deliver this type of contract in the future.
- 11.27 From reviewing activity, our research has identified that ULR network meetings were regarded as valuable forums to discuss best practice, giving ULRs the confidence to discuss particular issues over the lifetime of the project and consider possible solutions.
- 11.28 Our research identified that the Networks of Excellence meetings were important in contributing to the retention of ULRs. They also had offered considerable added value to a range of other stakeholders including unions, WULF Project Managers and learning providers. It was also beneficial that Networks of Excellence were hosted in different parts of Wales to ensure wider accessibility for ULRs and local providers, although there was a demand from a number of ULRs to have more meetings held in North Wales.
- 11.29 We know from the research with ULRs that those first trained post April 2010 perform equally as well as those first trained pre April 2010. This is not the case for all the other Union Representative roles. Whilst we understand that all roles are different, and that in some experience in the role is important, we regard the ongoing support by Wales TUC for ULRs post training to be an important factor in performance in the role.

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| <p>Recommendation 4: In future contracts consideration should be given to continuing the resource to widen support networks for trained ULRs.</p> |
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- 11.30 Given the value in the wider support for ULRs there is value in researching how a similar approach could be adopted for the other Union Workplace Representative roles, particularly the Green and Equality role that more recent and from our research had less of a direct impact on employers and employees.

Recommendation 5: In future contracts consideration should be given to reviewing how wider support networks for Green and Equality Representatives could be resourced and delivered.

- 11.31 Learning Services has a clear understanding of the structure, value, and process for negotiating a learning agreement with an employer. The support has been valued by a number of unions that simply did not have the capacity and capability to deliver on their own. On the basis of the consultation undertaken it is evident that some agreements would not have been produced as quickly had it not been for Wales TUC support.
- 11.32 The value of learning agreements is not solely in terms of those employers who recognise the value of, and are committed to, union-led learning. The real added value comes from convincing previously reluctant employers of the benefit of such an approach. It is difficult to accurately assess how many of the new learning agreements achieved were with committed employers and how many relied upon Learning Services to effectively 'seal the deal'. We do however know from unions consulted in a number of instances Learning Services support was viewed as the difference in achieving agreement. This leads onto a wider issue of how the impact of distinct activities is measured.

Recommendation 6: In future contracts consideration should be given to the collection of data that clearly informs the impact of distinct activities. This could include a short questionnaire to all employers and unions on the activity and impact of each learning agreement developed, WULF project supported, etc.

- 11.33 Overall 43 per cent of Union Workplace Representatives highlighted that they did not have sufficient facility time to undertake the role. In short, Union Workforce Representatives have been trained to fulfil the role but are often limited by their employer as to how they can actually deliver the role.

11.34 This raises a number of important questions:

- What can Wales TUC and individual unions do to ensure that Union Workforce Representatives trained can actually deliver the role as intended? and
- Is it possible to know prior to training a Union Workforce Representative whether or not they will actually be granted facility time to deliver the role?
- What are the wider implications of the above questions for Welsh Government funding and Wales TUC activity?

Recommendation 7: It is recommended that the Welsh Government fully consider the issues around facility time prior to commissioning future union learning programmes to ensure that good value for money is achieved.

### **Support for WULF Projects**

11.35 Our research has revealed strong support and appreciation of the Wales TUC role in assisting WULF projects and the WULF Project Managers. The response from the majority of unions interviewed to the support on offer was largely positive. Wales TUC offered both capacity i.e. to support unions do more in terms of delivering the WULF project and expertise i.e. advice and guidance that directly translated to more successful outcomes. This included, for example, facilitating collaboration cross unions and WULF Projects to achieve economies of scale and reduce costs per learner. However, we have not been able to quantify the scale of such efficiencies due to lack of data.

11.36 The support provided by Learning Services varied considerably across unions. This was due to the demand for the support rather than the capacity of Learning Services to respond. For example, a number of the larger unions had developed both the capacity and experience, largely gained from previous WULF rounds, to develop project bids without Learning Services assistance. Learning Services did not duplicate work of unions but delivered additional support that in the majority of instances would not have been delivered had the service not been available.

- 11.37 Delivering WULF Projects in isolation would not embed workplace learning cultures in the long term. Learning Services engaged projects to maximise funding and seek long term sustainable solutions to continue the workplace programmes. This is ongoing work with all projects and involves working through union officers and the senior management of unionised workplaces.
- 11.38 Our research with unions and WULF Project Managers has revealed that as a consequence of 2010-13 activity many more employers now understand how a WULF project can assist them in upskilling the workforce. Employers have reportedly started to see the training provision within WULF projects as more beneficial over the past 3 to 4 years.
- 11.39 Our research identified a union who believed that they were unlikely to have secured a WULF project without the support and initial advice of Learning Services. In terms of future priorities it is likely that the level of support required from Learning Services will reduce as unions have the capability to deliver WULF bids internally. Consideration will therefore need to be given to scaling back the supply of support in response to diminishing demand.

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| <p>Recommendation 8: It is recommended that the Welsh Government consider in detail the future support requirements for WULF projects that should be delivered by Wales TUC.</p> |
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### **Wider Learning Services Activity**

- 11.40 The aim of Wales TUC Learning Services was to provide expertise, advice and support to unions and employers; engaging with providers and learning agencies and supporting ULRs and WULF programmes. The aim was to add value by working flexibly and responding to emerging priorities of unions, employers and the Welsh Government.
- 11.41 In their umbrella role, Wales TUC support also extended into other areas. For example, they helped inform the Workforce Development Fund (WDF) that provided a 50 per cent contribution for training for employees to fund the workforce. Whilst not strictly within the Business Case, it is an example of how Wales TUC responded flexibly as part of overarching arm of support they provide.

- 11.42 Not being able to consult directly with learners (i.e. employees) and wider gaps in data available (i.e. number of learners supported and the outcomes of their learning) has limited our ability to identify the accurate impact on wider workforce learning. We have been reliant upon the views of Union Workplace Representatives, the Welsh Government, union representatives at a range of levels and a limited number of employers. Wider research with a larger sample of employers alongside other end user beneficiaries (employees as learners or those supported with personnel related issues) would have provided a more rounded data set to analyse and interpret.
- 11.43 The activity funded, particularly Learning Services has been wide in scope, covering high level strategic activity to the opposite end of the scale with Development Officers providing one to one support to individual ULRs. The impact of some of this activity has been difficult to assess accurately, limiting our ability to add up all the building blocks of activity to provide a cumulative assessment of value for money.
- 11.44 On the basis of the data available we are confident in making the following observations about the contract. Wales TUC:
- Performed a valuable role in ensuring WULF projects were cohesive by suggesting and facilitating the coordination of projects across unions to better support workers;
  - Provided information on newly established funding streams in learning and education and raise awareness of opportunities for unions and Employers;
  - Facilitated meetings with individuals to encourage enrolment onto the courses;
  - Provided advice on the European Social Fund as a potential fund to supplement the WULF projects;
  - Added value to learner engagement by working with the unions to remove barriers in the workplace;
  - Engaged with providers to ensure flexible delivery and support the development of onsite learning centres and the development of Learning Agreements;
  - Developed relationships with learning providers and other stakeholders to support union personnel identify appropriate and cost effective learning provision;

- Provided liaison between unions and providers to ensure value for money and overcome economies of scale by getting projects to collaborate and share resources/courses directly leading to more learners;
- Levered in other forms of funding and worked with union officials to negotiate co-investment;
- Liaised with providers all over Wales to ensure that projects and employers do not overpay for learning;
- Promoted Welsh Government programmes to hundreds of employers across Wales through existing networks

11.45 Our research is clear that Wales TUC has sought to provide support only where there is a demand. This 'pick and mix' approach has been sensible and ensured that duplication of activity has been minimised.

11.46 At this stage it is worth examining how Learning Services have considered a best value approach to utilising resources. On the basis of the evidence collected and analysed it is evident that Learning Services sought to optimise funding by facilitating collaboration across unions and projects to achieve economies of scale. Without this approach it would inevitably have led to more work for unions and to a lesser extent the Welsh Government (in terms of coordination, etc.).

11.47 Our research has established that the Wales TUC contract delivered wider operational benefits to the Welsh Government that enabled more efficient and joined up delivery. For example, the Welsh Government utilise Wales TUC as a conduit to liaise with the union movement. As an umbrella body Wales TUC ensure that unions are appropriately engaged and involved in a variety of wider Welsh Government initiatives.

11.48 There was a risk that each of the objectives of the Business Plan 2010-13 could have been delivered in a silo approach. This has not been the case, to the benefit of beneficiaries, with added value gained from linkages across objectives. There is a risk that if an alternative provider was given such a wide remit, or that the contract is commissioned in 'silos' that this is lost in future delivery.

Recommendation 9: In any future commissioning decisions consideration should be given to commissioning a single comprehensive programme of activity rather than separate silos of services.



## **Monitoring and Assessing Future Impact**

- 11.49 The process of undertaking this evaluation has enabled us to form a view about what the real and tangible measures of success should be. We believe that moving forward it is important that assessment moves beyond the quality of the activities delivered and outputs to the actual outcomes achieved.

Recommendation 10: The Welsh Government and Wales TUC should consider the development of an appropriate evaluation framework and make available the necessary resources to implement this. The resources required to deliver this needs to be commensurate with the scale and risk of the programme.

- 11.50 Alongside this, or indeed depending on the progress of the emergence of any evaluation framework, we believe a reasonable approach would be to undertake a broad independent evaluation at the mid-point of delivery. This would serve to assess progress to date on the key impact measures whilst also enabling recommendations on improved practice to be considered for the remainder of the programme and future iterations.

## **Considering Options for Delivery**

- 11.51 We recognise that the level of funding provided to Wales TUC via the 3 year programme is significant. It is therefore important, in terms of transparency, to consider whether the opportunity to deliver the contract could be widened to include other organisations, regardless or not if Wales TUC had delivered upon the expectations of their Business Case.
- 11.52 Employer engagement is critical to the success of adult learning. Unions are uniquely placed to engage employers and when an employer recognises a union, it has an automatic right to negotiate for learning activity. This could simply not be delivered via a non-unionised organisation. Wales TUC do not make a profit from the contract. In fact, they provide considerable time in kind. We think it is very unlikely that the Welsh Government will receive such an offer from a private provider.

11.53 On the basis of our research we believe that Wales TUC is uniquely placed to deliver a contract of this scale and scope based upon:

- They are a national organisation with a mandate through the union movement to access employers
- They have the existing relationships with a whole range of partners necessary to deliver the role and remit
- This contract has been delivered effectively, in line with the agreed Business Case
- Reputation for quality and the important factor of trust
- Holistic service, working flexibly beyond the accepted margins of the contract to do what is best for employees rather than what is best for Wales TUC
- Staff are knowledgeable, experienced and well regarded by partners (although we accept that they would be subject to TUPE as part of any new arrangements)
- Learning Services and Education Services are part of the same organisation, ensuring a complementary offer across both parts of the Business Plan, providing significant added value at an operational level.

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| Recommendation 11: The Welsh Government should continue to recognise Wales TUC as the organisation to deliver similar single contracts in the future. |
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