

Research Report  
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# *A Second Evaluation of the Union Learning Fund*

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**Department for Education and Employment**  
**An Evaluation of the Union Learning Fund: Round 2**  
**Final Report**

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## SUMMARY

### **Background**

- *The early evaluation of the ULF Round 1 projects in 1998/99 concluded that ULF had been a success in its first year but that it was too early to assess whether project activities would be sustained or if the ULF had supported the longer term development of union capacity to support workforce learning.*
- *The aim of the evaluation of Round 2 of the ULF is to assess progress of projects funded in Round 2, the longer term impacts of projects funded in Round 1, to review implementation and the features of effective and sustainable projects. There has also been a special focus on the projects funded specifically to address Basic Skills.*

### **ULF Projects**

- *There has been a total of 109 ULF funded projects in Rounds 1 & 2. 19 projects in Round 2 are 'continuation projects', further developing activities started in Round 1.*
- *There has been an increase in the range of other funding sources levered in to support ULF activities but no increase in the total amount of additional funding levered in to sustain activities or linkages developed with other 'mainstream' workforce development initiatives such as Investors in People.*

### **Outputs**

- ***Round 2:** 4,460 learners completed courses, 79 accredited courses or qualifications have been developed, 2,400 ILAs have been accessed. **All ULF Projects:** 6,630 people have completed courses, 1,300 learning representatives trained, 2800 ILAs accessed and there have been projects working with people in over 1,000 workplaces.*
- *The average volume of outputs per project has increased for some but not all areas of activity. Cost per learner has reduced considerably to an average of £803.00*
- *58% of projects funded in Round 1 did not seek further funding from the ULF. There has been no further continuation of learning activities in half of these projects.*
- *There has been an increase in the national focus of projects (to 1/3 of Round 2 projects). However, there remains a concentration of activity in certain regions, notably where Bargaining for Skills teams are relatively strong.*

### **Project Management and Implementation**

- *Despite significant achievements and some improvement in performance, a large minority of projects have delivered short of their expected targets. Although it is recognised that the achievement of numeric targets is not the only focus of the ULF, achieving stated objectives and demonstrating achievements are key to ensuring credibility.*
- *Aspects of project management that remain relatively weak are project monitoring and evaluation that underpins planning for continuation. New projects need to ensure that training supervision and support for staff to deliver projects is built into ULF projects to ensure sufficient internal capacity is developed to meet the union learning agenda.*

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- *In a small number of cases project activities are 'provider-led' or 'employer-led'. In some of these instances, the project has achieved its targets, but there appears to be little value added from union involvement in this activity and limited capacity built within the union.*

### **Learning Delivery**

- *Overall, in Round 2 unions have been more directly involved in the development and delivery of learning and key lessons are being learned about how to ensure quality and value for money from providers.*
- *Working with providers, unions have been promoting innovation through contextualising existing materials to make provision more relevant to learners at work.*

### **Access to Learning**

- *ULF projects continue to be successful in engaging non-traditional learners including those with basic skill needs, however there are also notable successes by specialist unions in developing access to provision and promoting CPD amongst professional workers.*
- *A key feature of many projects continues to be the development and training of learning representatives. There still remains the need for union and employer commitment to ensure that learning representative activities are supported and sustained in the longer term.*

### **Basic Skills Projects**

- *The group of basic skills projects have made good initial progress in developing structures of support in a limited period of time. However, the extent to which learners with basic skills needs have been engaged in learning has been below that expected and in retrospect many targets for learning outcomes were over ambitious.*
- *The methods of 'recruitment' to basic skills courses that have been explored provide good practice 'tips' and models. This learning has underpinned the TUC's 'Better Basic Skills' handbook. This good practice needs to be disseminated widely both to unions and other partners seeking to address basic skills needs.*

### **Union Capacity Building and Strategy**

- *There have been further increases in union capacity to deliver learning services but there is still a lack of planning for sustainability across many projects which rely on the ULF for continued support. A key challenge remains in ensuring that the good progress made in developing union learning is sustained and further integrated into other workforce development activities.*
- *There is evidence that the level of debate about the role of the union in learning at national executive level has increased. A number of unions have begun to develop their own structures of support for workforce learning and this includes in a number of cases the creation of new 'learning officer' posts.*

### **Trade Union Value Added**

- *Union value added in promoting lifelong learning amongst the workforce relates to the strength of the relationship that representatives and officers have with individuals at work and their ability to give confidence and support to learners. ULF projects have also begun to*

*impact upon employer attitude and strategies towards learning, and promoting access to learning to a wider range of the workforce.*

### **Key Success Factors**

- *'Success' is defined both as a project delivering its stated objectives and in making progress to ensure that activities are sustainable. The critical success factors are:*
  - *Sound project management;*
  - *Good project design: by ensuring that learner needs are known and shape provision;*
  - *Effective project integration with employer learning strategies, union learning strategies or 'mainstream' post-16 initiatives.*

### **Overview and Conclusions**

- *Projects have achieved significant progress and project performance has improved in terms of cost per output but not in terms of delivery to all targets. There is a need for unions and the support from DfEE and the TUC to encourage unions to develop union learning activities and capacity building within a medium-long term strategy.*
- *Issues of capacity, sustainability and integration continue to need to be addressed to ensure that the momentum that has been gained is not lost and that the expectations of those in the workforce that have been brought into learning are not disappointed. This requires projects to be regarded by unions, employers and those managing and working on them as not only an end in themselves but as part of a longer term and integrated development of learning initiatives.*
- *There is a need to ensure that **union learning develops at a more strategic level** with both unions and employers to help ensure that ULF workplace activities are more effectively integrated into employer and other mainstream initiatives.*

### **Implications and Recommendations**

#### **Policy and Strategy**

- *Through the bidding process and the ULF prospectus, stronger emphasis needs to be placed by DfEE on the requirement for unions to develop projects within the context of a medium or longer term strategy. This should include strategic approaches at one or all of the following levels:*
  - *A national/regional/sectoral strategy to promote workplace learning;*
  - *Working strategically with individual employers to develop workplace learning and linkages to other workforce development initiatives such as Investors in People;*
  - *Sharing good practice with employers and providers to promote access to workplace learning.*
- *Whilst recognising the competitive pressures facing some unions, further encouragement should be given to the development of cost effective joint solutions which help to sustain member learning activities.*

### ***Dissemination***

- *There is a need for unions to be able to demonstrate more clearly the added value of their activities. Particularly, the extent to which non-traditional learners are engaged and the progress made by them. We recommend that unions set out more clearly the range of outputs and impact expected from projects.*
- *Unions, working with the TUC, need to further develop communication to ensure that the value added contribution of union learning activities is demonstrated and disseminated to employers, employer fora and other post-16 agencies.*

### ***Training and Support***

- *There is continued demand for training and support on project management and for this to include advice on bid writing and planning for sustainability and continuation. We recommend these themes are included in the workshops for ULF projects. The DfEE should also consider supporting ULF bids which specifically seek to develop union capacity through the training and development of key project workers and share good practice between unions or of projects which focus on ways of encouraging unions to develop a more strategic and sustainable approach to the development of learning services.*

### ***Evaluation***

- *There is a need to ensure that ULF projects develop their ability to demonstrate effectiveness. Improvements need to be made in project evaluation so that projects are better able to report on learners outcomes and impact. Good practice tips and examples on evaluation to be disseminated to unions and project contracts set out evaluation requirements. The national evaluation methodology must now be further developed to build a systematic approach to measuring impact of the ULF on learners, employers and union capacity. We recommend that the DfEE commissions a survey of ULF learners and employer organisations involved in ULF activities to better understand their characteristics and the impacts achieved.*



## 1 BACKGROUND AND EVALUATION OBJECTIVES

*"It is now important, in year two of the Union Learning Fund, to consolidate gains and to capture the best that is being achieved, ensuring that it becomes part of the union movement's bloodstream." David Blunkett, September 1999.*

### **KEY POINTS**

- *The early evaluation of the ULF Round 1 concluded that ULF had been a success in its first year but that it was too early to assess whether project activities would be sustained or if the ULF had supported the longer term development of union capacity to support workforce learning.*
- *The aim of the evaluation of Round 2 of the ULF is to assess progress of projects funded in Round 2, the longer term impacts of projects funded in Round 1, to review implementation and the features of effective and sustainable projects. There has also been a special focus on the projects funded specifically to address Basic Skills.*

### **Background**

- 1.1 The Union Learning Fund (ULF) was announced in 'The Learning Age' Consultation Paper published in February 1998. The Fund aims to promote innovative activity by trade unions to support the creation of a learning society.
- 1.2 ULF activities take place at a time of considerable change in the national, regional and local structures supporting learning opportunities, notably the establishment of Learning and Skills Councils and Regional Development Agencies Skills Action Plans and of Learning Partnerships.
- 1.3 ULF activities also need to be viewed within the context of 'New unionism' and the changes taking place within the union movement which is seeking new members and developing the union role in a rapidly changing employment environment.
- 1.4 The evaluation of Round 1 projects concluded that the ULF had been a success in its first year. Overall, projects had significantly exceeded initial targets and contributed to lifelong learning through supporting and stimulating 'bottom-up' demand for learning and in many cases supporting non-traditional learners to access learning. However, the Round 1 evaluation also identified the lack of project management experience and knowledge of the 'learning market' as a constraint.

- 1.5 Round 1 projects were mainly local in their focus and although union members regarded projects as a positive service, it was too early to assess whether project activities would be sustained or if the ULF had supported the longer term development of union capacity to support workforce learning.

## Evaluation Objectives

- 1.6 The objectives of the evaluation of the ULF in Round 2 are to:
- **assess the early progress of the second round projects to see how quickly and effectively they are being set-up;**
  - **assess the longer term impact of round one projects, including those which ended after round one, or have continued with or without ULF funding;**
  - **identify the longer term impacts of projects on unions, whether projects lead to changes in union management and organisation around the delivery of training, union partnerships with other organisations (providers, TECs, employers, etc) to organise and deliver training;**
  - **report on the outputs and future likely outputs of projects;**
  - **assess whether project activities are sustainable over the longer term;**
  - **report on the planning and implementation of projects;**
  - **identify the unique contribution unions have made as a result of funding.**
- 1.7 This evaluation seeks to make recommendations for the future development of the Fund including how it might work in the new Post-16 arrangements and to recommend how projects can be evaluated over the long term, including Round 3 and possibly Round 4 and beyond the lifetime of this parliament.

## Basic Skills Projects

- 1.8 The evaluation includes special focus on Basic Skills projects that have been funded by ULF and assesses the impact of these projects on individuals, unions and employers. The features and outcomes of these projects are reported separately in Section 7.

## Evaluation Issues

1.9 The evaluation has been developed to reflect the following key issues:

- what evidence is there of increased union capacity to support learning?
- what evidence is there of increased take-up of learning by employers and employees?
- what examples are there of innovative ways of encouraging learning (including examples of good practice which could be disseminated more widely and in other contexts)?
- what evidence is there that new learning opportunities are available to all employees/union members and previously excluded groups?
- to what extent have Unions developed partnership arrangements with employers (including smaller firms) to encourage learning amongst the workforce?
- what linkages are there to employers take-up of other learning/training initiatives including MAs, National Traineeships and New Deal?
- what evidence is there of the longer term sustainability of project activities, including whether longer term commitment has been secured from other partners like employers and providers?
- how dependent are projects on key union staff? What efforts are being made by Unions to widen staff expertise and experience in developing and delivering lifelong learning?
- how are ULF projects being managed and/or overseen?
- what is the quality of Unions own project evaluations and how effectively have these been used?
- what are the implications for the TUC & DfEE to ensure the benefits of ULF activities are maximised?

## Methodology

1.10 York Consulting has made contact with all project managers at least twice during the Round 2 evaluation to clarify our understanding of project activities, to collect monitoring information on target and actual outcomes and feed back the issues faced and lessons learned by project managers and workers. **Appendix A** shows a full list of all ULF Round 1 and Round 2 projects.

- 1.11 Twenty projects were identified as case studies to discuss in more depth key aspects of activity. These involved interviews with project managers, project workers, employers, partners and participants in learning programmes as appropriate. A continued feature of the project has been the enthusiasm, commitment and willingness to contribute to the evaluation by those involved in the projects. Examples from projects are used to illustrate points raised throughout this report.

## Report Structure

- 1.12 **Section 2** sets out the profile of ULF projects over the two rounds of funding in terms of size and focus and **Section 3** reports on the quantifiable achievements of projects in Rounds 1 and 2.
- 1.13 The focus of the ULF is not only on supporting the delivery of learning, but also in building union capacity in this area. **Section 4** reports on project management and implementation and **Section 5** and **Section 6** focus on the learning delivery and issues relating to access to learning addressed by ULF projects.
- 1.14 **Section 7** reports on the progress of projects funded specifically to look at developing basic skills.
- 1.15 **Sections 8** looks at the extent to which union capacity and strategies for learning have been developed and **Section 9** reports on the added value ULF and union-led projects bring to the lifelong learning agenda.
- 1.16 **Section 10** summarises the key factors that are the features of successful projects. **Section 11** considers the implications of the Round 2 evaluation findings on the development of the ULF including the focus for evaluation of subsequent rounds. **Section 12** outlines our conclusions and recommendations.

## 2 PROFILE OF ULF PROJECTS

### **KEY POINTS**

- *There has been a total of 109 ULF funded projects in Rounds 1 & 2. 19 projects in Round 2 are 'continuation projects' funding activities started in Round 1.*
- *Projects in Round 1 established infrastructures (such as training learning representatives) to support learning initiatives. In Round 2, there has been a greater volume of learners engaged in learning activities.*
- *There has been an increase in the national proportion of projects with a national focus (to 1/3 of Round 2 projects). But there remains a concentration of activity in certain regions, notably where Bargaining for Skills teams are relatively strong.*
- *There has been an increase in the range of other funding sources levered in to support ULF activities but no significant increase in the total amount of additional funding levered in to support and sustain activities.*
- *There has been limited progress made in establishing greater linkages with other post – 16 workforce development initiatives, with the exception of ILA's.*

### **Introduction**

- 2.1 This section provides a profile of the projects supported by the ULF over the 2 Rounds, the level of ULF funding and the additional funding leverage secured from other funding sources. We also consider the themes and learning activities supported by ULF funding.

### **ULF Projects: 'old', 'new' and 'continuing'**

- 2.2 **Table 2.1** summarises the projects over the two rounds in terms of those projects that were funded in Round 1 but not Round 2 (referred to as 'old' projects), the projects that have been funded in Round 1 and 2 (referred to as 'continuation projects') and those funded for the first time in Round 2 ('new projects').
- 2.3 In the first round of the ULF:
- 45 projects were approved, run by 21 trade union organisations;
  - seven unions ran 3 or more projects;
  - the greatest number of projects run by one union was six (GMB);

- 26 of the 45 projects did not seek further support from ULF in Round 2.

2.4 In the second round of ULF there were:

- 64 projects funded, run by 34 unions;
- 9 unions ran more than 3 projects;
- 19 projects were 'continuation' projects, i.e. where the Round 2 project built on Round 1 activities. This may mean extending project activities to address learning needs identified during Round 1 (for example ISTC Basic Skills Project) or replicating project activities that were started in one location in another area (for example USDAW ILAs in Humberside project);
- the 45 'new' projects involved 15 unions that had run a ULF project in Round 1.

| <b>Table 2.1</b><br><b>Number of Old, New and Continuation Projects</b> |                           |                         |
|---|---------------------------|-------------------------|
| <b>Round</b>  | <b>Number of projects</b> | <b>Number of Unions</b> |
| Round 1 'Old'   | 45                        | 21                      |
| Round 2 'New'   | 45                        | 29                      |
| Round 2 'Continuation'  | 19                        | 15                      |
| <b>Total</b>  | <b>109</b>                | <b>37</b>               |

2.5 A distinction is made between 'new' and 'continuation' projects in Round 2 as it is expected that continuation projects would be more likely to achieve better outcomes because of the experience gained in Round 1, whereas 'new' projects, especially these run by Unions new to ULF might take longer to become established. **Section 3** looks at comparative performance.

## ULF funding

2.6 A little over £1.8 million was allocated in the first round of the Union Learning Fund. The highest grant was for £51,750 and the lowest for £11,500. In Round 2, the 64 projects including the Basic Skills pilot projects were funded to a total of £2.4m. The maximum awarded was £79,000 and the minimum £6,565. The allocation of funds over the two years is shown in **Table 2.2a and 2.2b**.

| Table 2.2a<br>ULF Funds by size of grant |           |    |           |    |
|--|-----------|----|-----------|----|
| Size of Grant (£)                        | Round 1   |    | Round 2   |    |
|  | n         | %  | n         | %  |
| 0 – 10,000                               | 0         | 0  | 1         | 2  |
| 10,001 – 20,000                          | 7         | 16 | 3         | 5  |
| 20,001 – 30,000                          | 3         | 7  | 16        | 25 |
| 30,001 – 40,000                          | 8         | 17 | 14        | 22 |
| 40,001 – 49,999                          | 11        | 24 | 18        | 28 |
| 50,000                                   | 15        | 33 | 6         | 9  |
| Over 50,000                              | 1         | 2  | 6         | 9  |
| <b>Total</b>                             | <b>45</b> |    | <b>64</b> |    |

2.7 **Table 2.2a** shows the allocation of funds by size of project. The most notable changes are:

- a more even spread of projects across the size bands. A third of Round 1 projects were £50,000, however, in Round 2 there were a greater number of the smaller projects. Most of the smaller projects are the continuation projects, consolidating activities started under Round 1;
- there has been a small increase in the number of larger scale (£50,000+) projects where some Round 2 projects have sought to significantly roll out and replicate successful Round 1 activities.

2.8 **Table 1** in Annex B shows ULF funding by union across Rounds 1 and 2. The key points to note are:

- four of the 20 largest TUC affiliated unions have not accessed any funds from the ULF, two of the four are teaching unions;
- the larger unions have been the recipients of a large proportion of ULF funds: AEEU, GMB, GPMU, MSF, TGWU and UNISON projects account for just under 40% of all ULF funding in Round 2.

### Funding leverage

2.9 A key indicator of the sustainability and further development of projects is the extent to which additional sources of funding are secured to support activities. This measure only indicates cash funding secured from partners or other funds such as European funds. It does not include the FEFC funds accessed via colleges to fund learners on college courses.

2.10 Additional funding leverage indicates the extent to which unions and project partners are seeking to further develop other activities supported by the ULF such as the development of materials, systems or supporting networks. **Table 2.3** below shows additional funding 'levered-in' by ULF projects in Round 1 and 2. In Round 1, 16 of the 45 projects attracted total additional funding to the value of £453,000; this included one TUC regional project, which secured £100,000 of TEC funding.

| <b>Table 2.3:</b><br><b>Other Financial Contributions to ULF Projects</b> |         |               |                      |
|---|---------|---------------|----------------------|
|   | Round 1 | 'New' Round 2 | Continuation Round 2 |
| <b>Projects 'Levering in' funding</b>                                     |         |               |                      |
| Number of projects  | 16      | 8             | 5                    |
| Proportion of projects  | 36%     | 17%           | 28%                  |
| Average amount 'levered in'   | £28,334 | £58,365       | £19,928              |
| A breakdown of funding sources is available in Table 2 in Annex B         |         |               |                      |

2.11 In Round 2, 13 of the 64 projects have secured additional funding to the value of £561,560. Table 2 in Annex B shows further detail of the leverage secured. Nine projects still have bids outstanding to a number of sources in Round 2.

2.12 Although a wider range of additional funding sources have been used to support ULF development activities, overall a much smaller proportion of Round 2 projects (20%) have 'levered in' additional funding support than in Round 1 (36%).

2.13 Where projects have secured additional funding in Round 2, there is an average of an additional £43,200 per project, compared to the Round 1 average of £28,330 per project (£23,500 excluding the £100,000 TEC funding for the TUC Regional project). In terms of average amount 'levered in' the 'new' projects have outperformed the continuation projects, on average accessing a further £58,365 and £19,938 respectively. It should however be noted that on average the 'continuation' projects are on a smaller scale than most 'new' projects.

2.14 The pattern of leverage overall (including projects which attracted no additional money) is on a declining scale. There was £10,000 per project in Round 1, £8,800 in Round 2, and £5,000 for continuation projects.



- 2.15 The amount of additional leverage in Round 2 must be considered disappointing at this stage, especially in light of the Union Learning Fund's greater emphasis on sustainability. However, the outcomes of outstanding bids may alter this picture.
- 2.16 The relatively low level of leverage at this stage indicates that across Round 2 projects there is potential for activities to be reliant solely on the ULF for continuation. The proportion of Round 1 projects that did not seek ULF funding in Round 2 highlights that where learning projects have continued this is likely to be achieved with the support of other external funds (ESF, TEC etc) or on-going support from other union funds (see Section 3).

### Projects by Region

- 2.17 **Table 2.4** shows the distribution of projects by each of the Regional Development Agency areas. National projects include those that are working with national partners (e.g. NTOs) to develop new qualifications and learning routes, projects developing on-line based learning materials and TUC-led developments such as work on ILAs and Ufi. Table 2.4 highlights that:
- **in Round 1, almost a quarter of projects had a national focus, a further quarter were located in the North West region;**
  - **Round 2 saw an increase in the proportion of projects with a national focus, to nearly one third of all projects;**
  - **there is a noticeably wider spread of projects across the regions, particularly in the South West and West Midlands;**
  - **there remain relatively few projects located in the East Midlands, Eastern or South Eastern regions which are themselves areas where the workforce is relatively less unionised.**
- 2.18 The distribution and development of projects in the regions reflects the relative strengths and profile of the Bargaining for Skills teams and their capacity to engage, encourage and support the development of ULF bids and project delivery. The spread of activity will also reflect, in part, union density. The DfEE may wish to see bids from areas where activity is under-represented, for example by encouraging bids from unions with successful projects seeking to replicate those in areas where activity is low. The link between the geographic spread and the profile/strength of BFS teams should also be noted.

**Table 2.4: ULF Projects by Region**

| Region                   | Round 1 |    | Round 2 |    |
|--------------------------|---------|----|---------|----|
|                          | N       | %  | n       | %  |
| East Midlands            | 3       | 7  | 2       | 3  |
| West Midlands            | 1       | 2  | 5       | 8  |
| Eastern                  | 1       | 2  | 1       | 2  |
| London                   | 7       | 16 | 7       | 12 |
| South East (excl London) | 1       | 2  | 2       | 3  |
| South West               | 3       | 7  | 7       | 14 |
| North West               | 11      | 24 | 9       | 15 |
| North East               | 2       | 4  | 1       | 2  |
| Yorkshire and the Humber | 5       | 11 | 7       | 14 |
| National                 | 11      | 24 | 19      | 32 |

## Project Themes

2.19 ULF projects cover a wide range of activities. Round 1 projects were categorised as focusing on one or more of the following:

- **Awareness raising** – related to the creation of a lifelong learning environment, concerning activities such as learning advocacy and needs identification;
- **Learning centres** – involving the development of learning centres and including links with the evolving UFI network;
- **‘Ready-made’ provision** – related to using a variety of delivery methods to provide solutions to a problem that has already been identified, including the use of IT, virtual learning centres and internet technology, as well as more traditional learning delivery;
- YCL has added a further category to the above, that of **‘Developing and testing new provision’**, into which we place projects that are exploring new approaches to overcoming barriers to learning or career development.

2.20 In 1999/00 the categorisation of projects has been developed to reflect the extent to which projects include one or more of nine specific activities and **Table 2.5** shows the number of projects involved in each of these.

**Table 2.5**  
**ULF Project by Theme**

|                          | Round 1 'Old'<br>n=45 |           | Round 2       |    |                  |    |             |           |
|--------------------------|-----------------------|-----------|---------------|----|------------------|----|-------------|-----------|
|                          |                       |           | 'New'<br>n=45 |    | 'Contin'<br>n=19 |    | All<br>n=64 |           |
|                          | n                     | %         | N             | %  | n                | %  | n           | %         |
| ILAs                     | 4                     | <b>9</b>  | 18            | 40 | 10               | 56 | 28          | <b>45</b> |
| Ufi                      | 8                     | <b>18</b> | 19            | 42 | 7                | 39 | 26          | <b>41</b> |
| Basic Skills             | 5                     | <b>11</b> | 12            | 27 | 4                | 25 | 16          | <b>25</b> |
| Learning representatives | 19                    | <b>42</b> | 16            | 36 | 9                | 50 | 25          | <b>40</b> |
| Learning Centres         | 12                    | <b>27</b> | 8             | 18 | 7                | 39 | 15          | <b>24</b> |
| Access/Equality          | 32                    | <b>71</b> | 22            | 49 | 10               | 55 | 32          | <b>51</b> |
| Union Strategy           | 10                    | <b>22</b> | 12            | 22 | 8                | 44 | 20          | <b>32</b> |
| Young Workers            | 4                     | <b>9</b>  | 5             | 11 | 1                | 6  | 6           | <b>9</b>  |
| EU Programmes            | 3                     | <b>7</b>  | 0             | 0  | 1                | 6  | 1           | <b>2</b>  |

2.21 Overall, Round 2 'new' and 'continuation' projects have a wider range of project activities. In Round 1, the focus of projects was very much on one or two core activities. These themes remain important, but in Round 2, an average project covers a wider range of activities. For example, a project might also include access to ILAs, or develop links with the University for Industry and union-based ICT learning projects.

2.22 There has been an increase in the proportion of projects which also focus on developing union strategy from one in five to one in three projects. Explicit reference is made by the following unions to the development of learning strategies: ASLEF, BFAWU, BECTU, CATU, GMB, GPMU, ISTC, MSF and UNISON.

2.23 There has been no increase on the proportion of projects that seek to address the needs of young workers and a decrease in projects explicitly linked to European programmes. The focus on young people was considered a key priority in the initial stages of the ULF. If this priority area remains, further emphasis needs to be placed on this as a target group for future ULF activities, or if other target groups are now higher priority, this needs to be clarified.

## Partnership with other organisations

2.24 One of the key aspects to developing learning capacity for unions is the extent to which they develop effective partnerships with other organisations. Working in partnership facilitates access to potential learners, to employers, to learning resources and expertise, to funding to sustain project activities and to progression routes for learners.

2.25 **Table 2.6** shows the number of projects involving key partners, in brackets is the % of overall project engagement.

| <b>Table 2.6:<br/>Analysis of Partner Organisations</b> |   |                    |
|---|---|--------------------|
|   | <b>Number and % of all projects in brackets</b> |                    |
|   | <b>R1<br/>N=45</b>                              | <b>R2<br/>N=64</b> |
| Colleges  | 38 (84)   | 42 (66)            |
| Universities  | 7 (16)  | 10 (16)            |
| TUC/BfS   | 15 (33)   | 21 (33)            |
| Other Unions  | 12 (27)   | 6 (9)              |
| Employers   | 21 (47)   | 38 (59)            |
| Employer Associations                                   | 7 (16)  | 11 (17)            |
| Training and Enterprise Councils (TECs)                 | 29 (64)   | 39 (61)            |
| National Training Organisations (NTOs)                  | 8 (18)  | 11 (17)            |
| Other Providers (private/WEA)                           | 13 (29)   | 18 (28)            |
| Others  |   |                    |
| - RDAs  | 1 (2)   | 2 (3)              |
| - Basic Skills Agency                                   | -   | 3 (5)              |
| - NIACE   | 1 (2)   | 2 (3)              |
| - Careers   | 3 (7)   | 1 (2)              |

2.26 The noticeable change in the type of partnership has been the increase in employer partners and the decrease in the proportion of projects involving other unions and colleges. Lessons which have been learned from the Round 1 experience are that:

- **involving a large number of providers at the outset was ambitious;**

- **key sector or employer partners are involved in a steering group as partners, and other providers are contacted/involved during the course of the project as learner needs are known.**
- 2.27 The result of this experience has been that where colleges and providers are involved as project partners a smaller core of organisations are involved at the outset, although during the project a wider range of providers might be involved.
- 2.28 The partnerships developed with learning providers have been crucial to many projects for ensuring success in accessing teaching and funding expertise, and in addition to the involvement of TECs as project partners, have been a significant group supporting the delivery of projects. A small number of colleges are involved in at least two ULF projects in Round 2 these are:
- **College of North East London;**
  - **Hull College;**
  - **Manchester College of Arts and Technology;**
  - **Filton College;**
  - **Mackworth College;**
  - **Southampton College of Arts and Technology.**
- 2.29 **Section 5** reports on the key lessons learned by unions in working with providers. This includes the need for unions to ensure that they remain in control of the relationship with providers and ensure that provision is accessed that meets learners needs, in terms of content, style and place of delivery.
- 2.30 A third of projects involve partnerships with the TUC through links to BfS and TUC in the regions. Although both the TUC and unions report that there is less intensive support required from projects that have become more established.
- 2.31 The data on employer partners does not include the total number of employers involved through for example the provision of release for rep or employee training, or management's attendance at awareness events. A total of 59 of all of the 109 ULF projects (54%) directly involve employers as project partners. This includes projects that seek to develop learning activities on-site, learning centres and the piloting of new sector-specific provision.
- 2.32 The number of TEC partners has increased although as a proportion of all projects this has declined. In Round 2, there are four projects that have links with all of the TECs in a region. These are in the following regions: London, North West, North East and East Midlands.
-

## Links with other post-16 learning initiatives

- 2.33 Another expected feature of more 'mature' projects is the extent to which ULF project activities become integrated with and complement other 'mainstream' post-16 learning initiatives. Integration offers the possibility of sustaining project activities both in terms of linking to opportunities for accessing 'mainstream funding' and linking learners to other learning routes and opportunities. There were good early signs of ULF projects developing links with other key initiatives. **Table 2.7.** shows these linkages in Round 1 and Round 2.

| <b>Table 2.7</b><br><b>Links with other post-16 learning initiatives</b> |                |                |
|--|----------------|----------------|
| <b>Initiative</b>  | <b>Round 1</b> | <b>Round 2</b> |
| Individual Learning Accounts:  |                |                |
| Number of projects reporting ILA elements                                | 6              | 18             |
| Collective Learning Funds under development                              | 8              | 2              |
| No. of ILAs targeted   | 600            | 1300           |
| No. of ILAs achieved to 14/4/00  | 488            | 2307           |
| No. of additional ILAs projected   | 250            | 370            |
| University for Industry  | 9              | 27             |
| Investors in People  | 3              | 4              |
| MA   | 3              | 1              |
| New Deal   | 3              | 1              |

- 2.34 Many ULF bids have made reference to the linkages that they expect to be made to other or work-based learning or training initiatives (Modern Apprenticeships, National Vocational Qualifications, Investors in People etc). However, the number of actual links made are much less than originally stated and in some cases it appears that this is little more than a 'catch all' approach to bid writing or indicates over ambitious project objectives.
- 2.35 The main area where there has been a considerable increase in the linkage to other post-16 initiatives is in the number of projects accessing ILAs for learners. This has been also supported by development work supported by TUC Learning Services which has involved the sharing of good practice between unions. A third of projects expected to develop links with Ufi projects although only a relatively small number have actually developed projects with specific links to Ufi through developing Ufi hub bids.

- 2.36 There has been a limited amount of linkage made with other work-based learning or training initiatives such as Modern Apprenticeships and the New Deal and very few projects have targeted or involved young learners or the unemployed.
- 2.37 A number of projects have been focused on raising awareness of NVQs, accessing NVQs or integrating NVQs in the work-place through the training of learning representatives as D32/D33 assessors. These are:
- **TGWU - Skills Challenge in the Road Haulage Sector;**
  - **AEEU - Developing Advice and Guidance through Learning representatives;**
  - **GMPU - Learning Zone and REACH projects;**
  - **UCATT - Building Learning;**
  - **MSF - Promoting NVQs in the Financial Services Sector and Promoting NVQs Through Learning Representatives.**
- 2.38 Four ULF projects have an explicit link to employer achievement of the **Investors in People standard**, and these provide interesting and practical examples of how unions and employers have worked in partnership to ensure that the principles of liP are embedded.

The **AEEU Learning Champions of Derbyshire** project involves Union/employer partnerships aimed at raising workforce skills and company competitiveness through developing mentors, accessing ILAs and training learning representatives. These developments are set within the specific aim of progressing companies towards achieving the Investors in People (liP) standard.

The **GMB project Skills Development Awareness in the Process of Change** has been focused on the delivery of a large liP employer's strategic plan to address expected changes in workforce over the next three years. The systematic self-analysis by employees of their training needs lead to the development of personal development plans linked to the needs of the organisation and their employability in the wider labour market.

- 2.39 A strong feature of ULF activities is that they are learner-led rather than 'initiative' led, and this feature needs to be retained to ensure that the union value added contribution to Lifelong Learning is retained. However, further consideration and planning needs to be given to the ways in which union learning projects **can** link into other learning initiatives, to ensure that ULF learners have access to and can progress to other learning and training opportunities.

### 3 PROJECT OUTPUTS

#### **KEY POINTS**

##### ***Achievements***

- *Round 2: 4,460 learners completed courses, 79 accredited courses or qualifications have been developed and 2,400 ILAs have been accessed.*
- *All ULF Projects: 6,630 people have completed courses, 1,600 Learning representatives have been trained, 2900 ILAs have been accessed and there have been projects involving employees in over 1,000 workplaces.*
- *There were some project outputs projected into April/May 2000, but the proportion of total activity 'rolled-over' at the end of the contract is less than last year indicating that activities and outputs have become established more quickly than in Round 1.*

##### ***Performance***

- *10% of projects did not set numeric targets.*
- *The volume of outputs per project on average has increased, but not for all areas of activity.*
- *Across most areas of activity, total outputs have exceeded initial targets with the exception of the number of learning representatives trained where difficulties have been experienced in securing release for learning representative training.*
- *Cost per outcome has reduced for several indicators, most notably cost per learner has fallen to £803.00.*

##### ***Continuation of Activity***

- *26 of the 45 projects funded in Round 1 did not seek further funding from the ULF. In half of these projects, there has been no further continuation of activities. This has sometimes been due to unforeseen circumstances such as site closure, but where this is the case, activities have not been integrated into other union or employer strategies to help ensure the experience gained and lessons learned are retained.*



## Project Outputs

### The Indicators

- 3.1 Quantifying the overall performance of ULF projects masks the variety of project models, activities and partnerships involved and the different contexts in which many projects have developed. However, obtaining an overview of the outcomes and comparing performance between Rounds 1 and 2 gives an indication of the extent to which capacity to deliver learning has been enhanced.
- 3.2 The following indicators are used to measure the range of ULF project outcomes:
- **number of people attending awareness/briefing sessions;**
  - **number of training needs analyses undertaken;**
  - **numbers of learners enrolled;**
  - **number of 'new' learners enrolled;**
  - **number of Individual Learning Accounts opened;**
  - **number of accredited courses developed/accessed;**
  - **number of other courses/materials developed;**
  - **number of learning centres developed/enhanced;**
  - **number of people achieving a qualification;**
  - **number of employers involved.**
- 3.3 This framework captures the majority of, but not all, activities. The indicators are also limited in the extent to which more strategic impacts can be measured. To address this, one third of Round 2 projects have been followed-up as case studies to assess impacts in qualitative terms. These are used as the basis for illustrating key themes and issues identified in Sections 4-8.

### Target Setting

- 3.4 Many projects did not outline quantifiable targets in their initial project proposals and a small number of projects did not have project monitoring in place to enable outputs to be recorded. The initial contact made with projects as part of the evaluation asked, where targets were not clear, for project managers to state the outputs expected. **Table 3.1** analyses the numbers of projects reporting outcomes for the above indicators against the number that stated targets either in their bid or during the early stage of the project.

- 3.5 It is noticeable from the Table that the proportion of projects setting at least one target has not changed significantly (89% in Round 1 compared to 90% in Round 2). There has been an increase in projects stating quantifiable targets against the fuller range of objectives, however, the evaluation process has been partly responsible for this.

| <b>Table 3.1:</b><br><b>Proportion of Projects Setting Targets</b><br><b>Against Those Reporting Outcomes</b> |                |                |                    |
|---|----------------|----------------|--------------------|
|   | <b>Round 1</b> | <b>Round 2</b> | <b>Diff. R2-R1</b> |
|   | <b>%</b>       | <b>%</b>       | <b>%</b>           |
| Proportion of Projects with at least one target   | 89             | 90             | 1                  |
| <b>Target</b>   |                |                |                    |
| Number of learners  | 63             | 92             | 29                 |
| Number attending awareness sessions   | 79             | 50             | -29                |
| Number of 'new' learners enrolled   | 44             | 50             | 6                  |
| Number of learning representatives trained  | 88             | 97             | 9                  |
| Number achieving qualifications   | 36             | 68             | 32                 |
| Number of accredited courses developed  | 86             | 88             | 2                  |
| Number of other materials developed   | 79             | 95             | 16                 |
| Number of employers directly involved   | 64             | 69             | 5                  |
| Number of learning centers established  | 75             | 100            | 25                 |
| Number of ILAs taken-up   | 100            | 100            | 0                  |
| Number of training needs analyses   | 63             | 70             | 8                  |

- 3.6 Whilst the achievement of targets is not the only objective of the Union Learning Fund, the ability of unions to plan, monitor and achieve outputs is a key factor which helps to demonstrate that union capacity to develop and deliver learning services has increased.
- 3.7 The monitoring of achievement and information relating to outcomes by projects is still an area in need of improvement. Key areas where reporting is weak is on the number of 'new learners', as data on the previous experience of learning is not systematically recorded and information regarding the characteristics of learners such as gender, age or ethnicity. This is a key area that needs to be addressed. Union value added to the achievement of Lifelong Learning targets centres, in many cases on Union's ability to engage 'non-traditional' learners. Stronger mechanisms need to be in place to demonstrate that this is the case. Examples of how this can be achieved include collecting information from participants as part of the initial assessment or learning needs analysis on the recent experience individuals have of informal learning (through courses or training at work).

- 3.8 Collecting and monitoring data may be problematic, especially if a provider or TEC is collecting the original/source data. Clarifying how monitoring data will be collected, when, and by whom is a key task that needs to be agreed in the early stages of the project.

### Outputs Achieved

- 3.9 **Table 3.2** shows a summary of the outputs of projects in Round 2 and the performance of all projects over the life of the ULF. A complete summary of project performance in Rounds 1 and 2 can be found in **Tables 3a to c in Annex B**. Our analysis of performance to target needs is to be qualified by the fact that 10% of projects did not set numeric targets. The table shows achievement of outputs across all projects:

- **in Round 2, 4,460 learners have taken part in learning;**
- **almost 900 learning representatives trained;**
- **79 courses developed;**
- **2,404 ILAs opened.**

- 3.10 Across the two years of ULF:

- **6,632 learners have taken part in learning;**
- **1,616 learning representatives trained;**
- **nearly 3,000 ILAs opened.**

| <b>Table 3.2:<br/>Outputs from all Projects</b> |                |                         |
|---|----------------|-------------------------|
| <b>Outputs</b>                                  | <b>Round 2</b> | <b>All ULF Projects</b> |
|   | <b>No.</b>     | <b>No.</b>              |
| Number of learners                              | 4,460          | 6,632                   |
| Number attending awareness sessions             | 7,725          | 13,453                  |
| Number of learning representatives trained      | 882            | 1,616                   |
| Number achieving qualifications                 | 834            | 1,437                   |
| Number of accredited courses developed          | 79             | 91                      |
| Number of other materials developed             | 44             | 95                      |
| Number of employers directly involved           | 549            | 1,182                   |
| Number of learning centers established          | 15             | 26                      |
| Number of ILAs taken-up                         | 2,404          | 2,892                   |
| Number of training needs analyses               | 1,523          | 3,766                   |

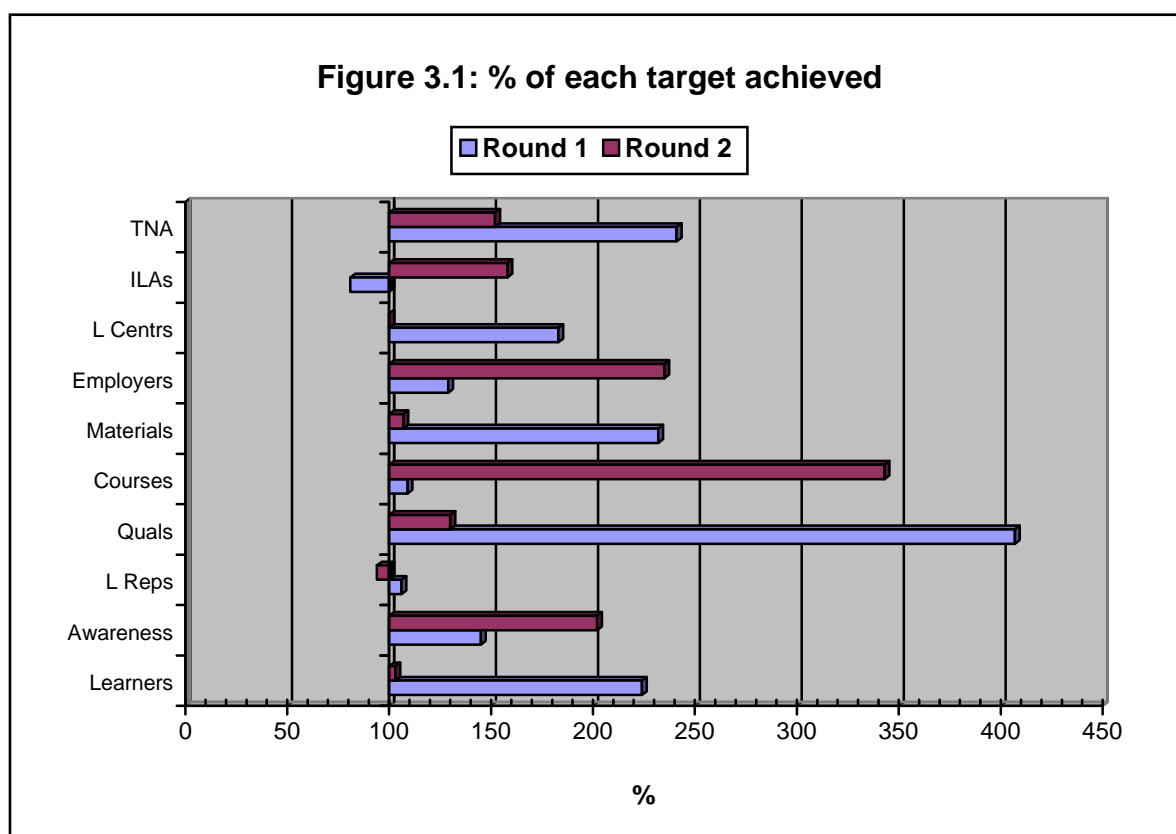
- 3.11 The average number of learners involved per employer (where employers have been directly involved) has risen from 19 learners per employer to 40 learners per employer. This indicates that the majority of ULF activity is taking place within large organisations.

## Achievement to Target

### Performance Against Each Indicator

3.12 **Figure 3.1** shows the percentage of cumulative targets achieved across all projects, for Round 1 and 2. This figure shows the total outcomes against the cumulative target (where set) across all projects. This figure masks the fact that some projects were under target and others exceeded targets. As expected, overall, Round 2 projects will show an improvement in the delivery of outputs to targets due to both more realistic target setting and more experience in project management.

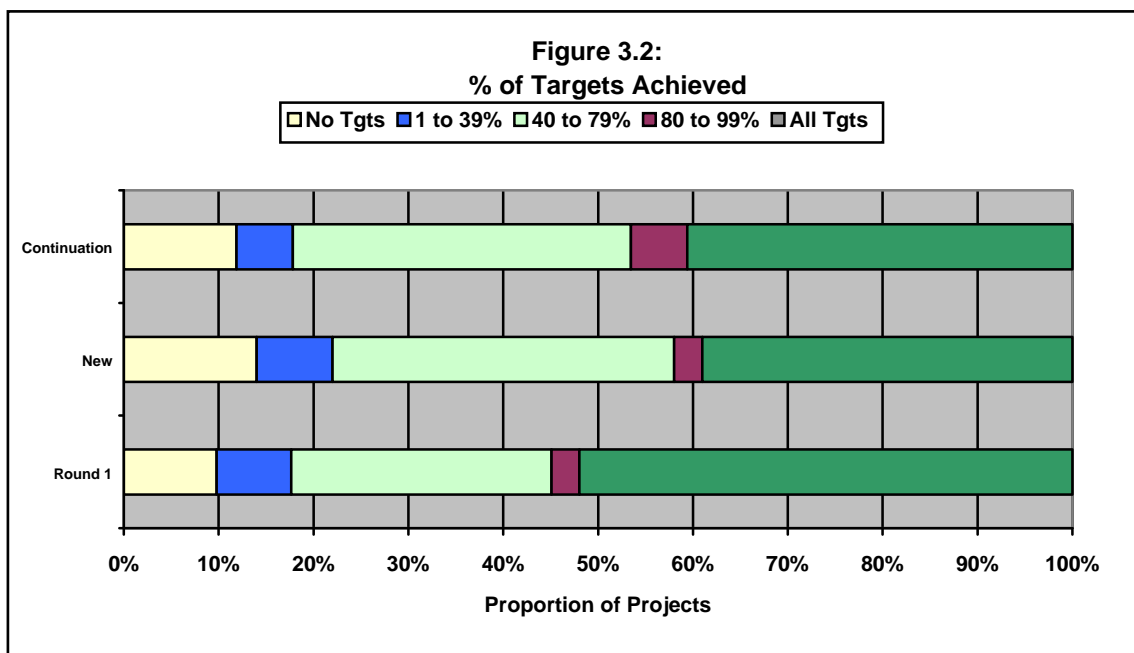
3.13 In both years, most cumulative targets have been exceeded with the exception of, in Round 1, the number of number of ILAs taken-up and in Round 2 the number of learning representatives trained.



- 3.14 Areas of particular success in Round 2 have been the development of accredited courses and the engagement of employers, both of which have exceeded targets by over 300%.
- 3.15 The failure of projects to reach the learning representative targets must be a concern as the learning rep role is a cornerstone of potential capacity to support learning. A key difficulty experienced has been securing release for training by employees.

### Project Performance Against All Targets

- 3.16 The evaluation of Round 1 projects found that even where certain projects had significant 'wins' in terms of achieving certain targets, most projects did not achieve **all** of their stated targets by the end of the funding period. Follow-up of Round 1 projects one year on has found that only just over half of all projects have achieved all of their original targets.



- 3.17 An analysis of the projects' performance in achieving all its stated targets is outlined in **Figure 3.2**, which shows the proportion of targets attained.

3.18 Figure 3.2 shows a similar pattern across all three types of project; with 40-50% of projects achieving all their targets, while the majority of the rest will achieve a number but by no means all of their targets. In addition 10-12% have not succeeded in achieving any of their targets.

3.19 A key point to note is that 'continuation' projects are more likely to have achieved all their targets or achieved at least 80% of them than 'new' projects, indicating a slightly better performance to target of the more established projects, and given that Round 2 projects have a wider range of activities/targets, indicates that capacity to manage more complex projects has developed. However, more specific and realistic target setting needs to be achieved.

### **Performance of Projects Covering Different Themes**

3.20 Analysis of performance by project theme shows that there is no specific type of project that is significantly more likely to achieve its targets although there are a number of key factors that help ensure success. Lack of success in achieving targets is related to the following:

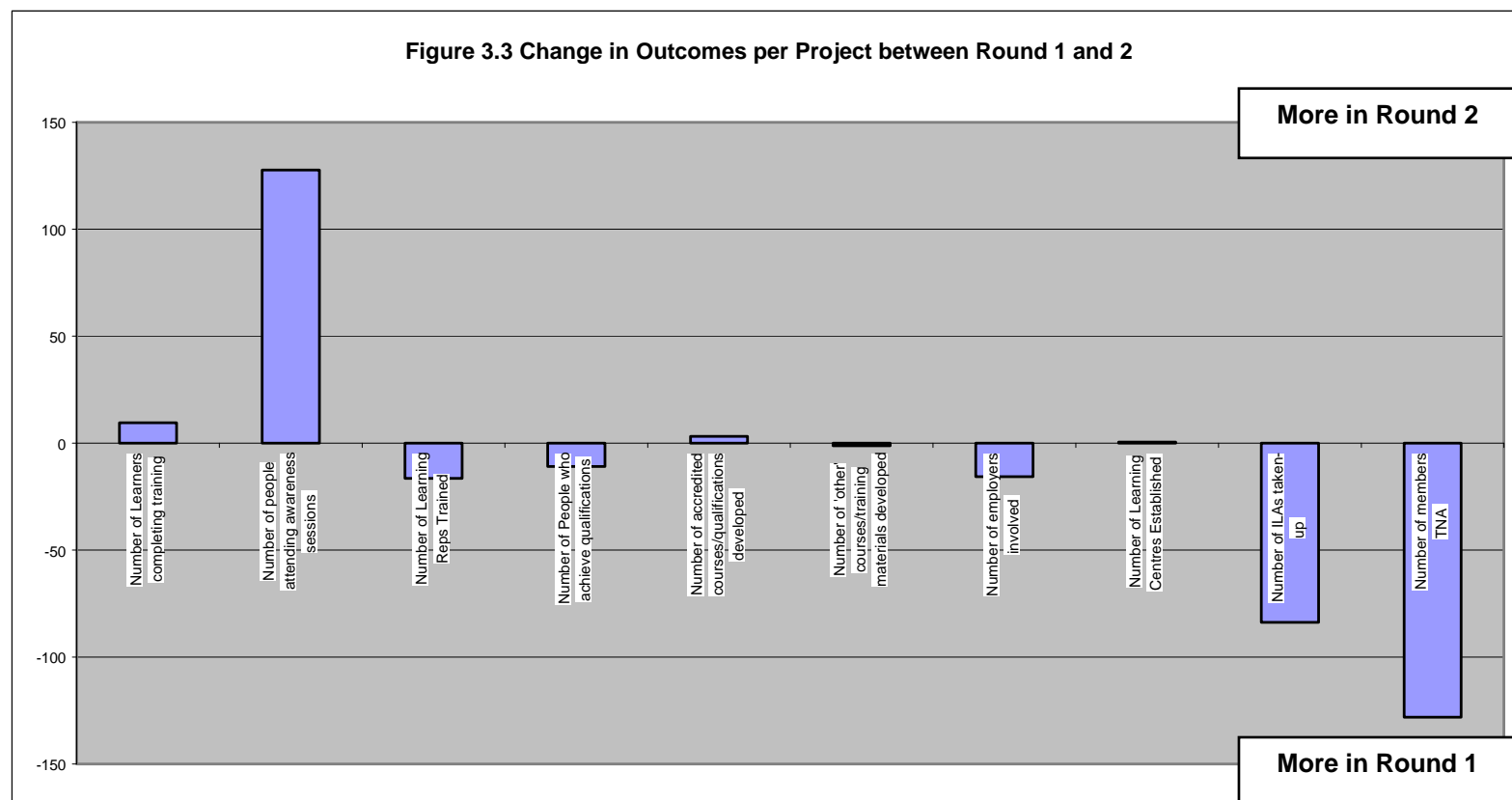
- **a tendency for some project bids to list a range of themes and targets trying to 'cover all bases';**
- **setting unrealistic targets;**
- **external factors affecting achievement are notably the national ILA framework in transition and Ufi developments, which have been slower than anticipated.**

### **Outputs per project**

3.21 In order to gauge the extent to which ULF projects achievements have improved between the two rounds, **Figure 3.3** shows the change in outputs per project achieved in Rounds 1 and 2. The data reports the average number of outputs achieved for only those projects with a target for that activity.

3.22 Figure 3.3 highlights that:

- in two key areas, awareness raising and number of learners enrolled the performance in achievements per project has improved. However, in two other key areas, numbers of learning representatives trained per project and number of people achieving qualifications per project have declined slightly in Round 2;
- the total numbers completing learning has increased from 2,172 in Round 1 to 4460 in Round 2. This translates to an increase of ten learners per project in Round 2 to an average of 124 per project;
- the numbers of ILAs taken up per project has decreased, but in Round 1, two large projects focused on ILAs, securing access to a total of ILAs for 740 learners, an average of 370 per project. In Round 2 the number of projects accessing ILAs has risen to 18, between them accessing 2,404 ILAs, an average of 160 per project. 18 projects have identified people wanting to access ILAs, but these have not been available due to TEC allocations reaching their limit;
- the total number and number per project of Training Needs Analyses has decreased between Round 1 and Round 2 due mainly to the many 'continuation' projects which undertook TNA work in Year 1 that in Year 2 have focused on the running of courses to meet the needs identified.





## Cost per Output

3.23 **Table 3.3** shows an analysis of cost per output for the key indicators over the two funding rounds. The data shows the average cost of producing one unit of output. The calculation only includes the cost of projects that include this output, but does not account for the proportion of the project budget used in attaining these outputs.

| <b>Table 3.3:<br/>Cost per Output</b>                  |                |                |                   |                                     |
|--|----------------|----------------|-------------------|-------------------------------------|
| <b>Output</b>  | <b>Round 1</b> | <b>Round 2</b> | <b>Difference</b> | <b>Unit Cost<br/>(all projects)</b> |
| Number of learners completing training                 | £ 1,614.26     | £ 803.03       | £ -811.23         | £ 1,083.27                          |
| Number of people attending awareness sessions          | £ 675.28       | £ 238.35       | £ -436.93         | £ 462.72                            |
| Number of learning representatives trained             | £ 1,941.89     | £ 2,187.31     | £ +245.42         | £ 2,101.95                          |
| Number of people who achieve qualifications            | £ 4,304.61     | £ 2,707.52     | £ -1,597.08       | £ 3,293.12                          |
| Number of accredited courses/qualifications developed  | £32,636.51     | £26,995.35     | £-5,641.17        | £28,712.22                          |
| Number of 'other' courses/training materials developed | £24,283.39     | £26,154.37     | £+1,870.98        | £25,360.62                          |
| Number of employers involved                           | £11,341.65     | £16,265.46     | £+4,923.81        | £14,572.90                          |
| Number of Learning Centres established                 | £38,910.91     | £31,984.38     | £-6,926.53        | £35,447.64                          |
| Number of ILAs taken-up                                | £ 207.07       | £ 894.50       | £ +687.43         | £ 813.63                            |
| Number of members TNA                                  | £ 345.33       | £ 633.86       | £ +288.53         | £ 505.63                            |

3.24 Cost per learner has fallen by half to £803.03. The average cost of developing a new course has fallen to £26,000, and of a learning centre to £32,000.

3.25 **Figure 3.4** shows the difference in costs per output between Round 1 and Round 2.

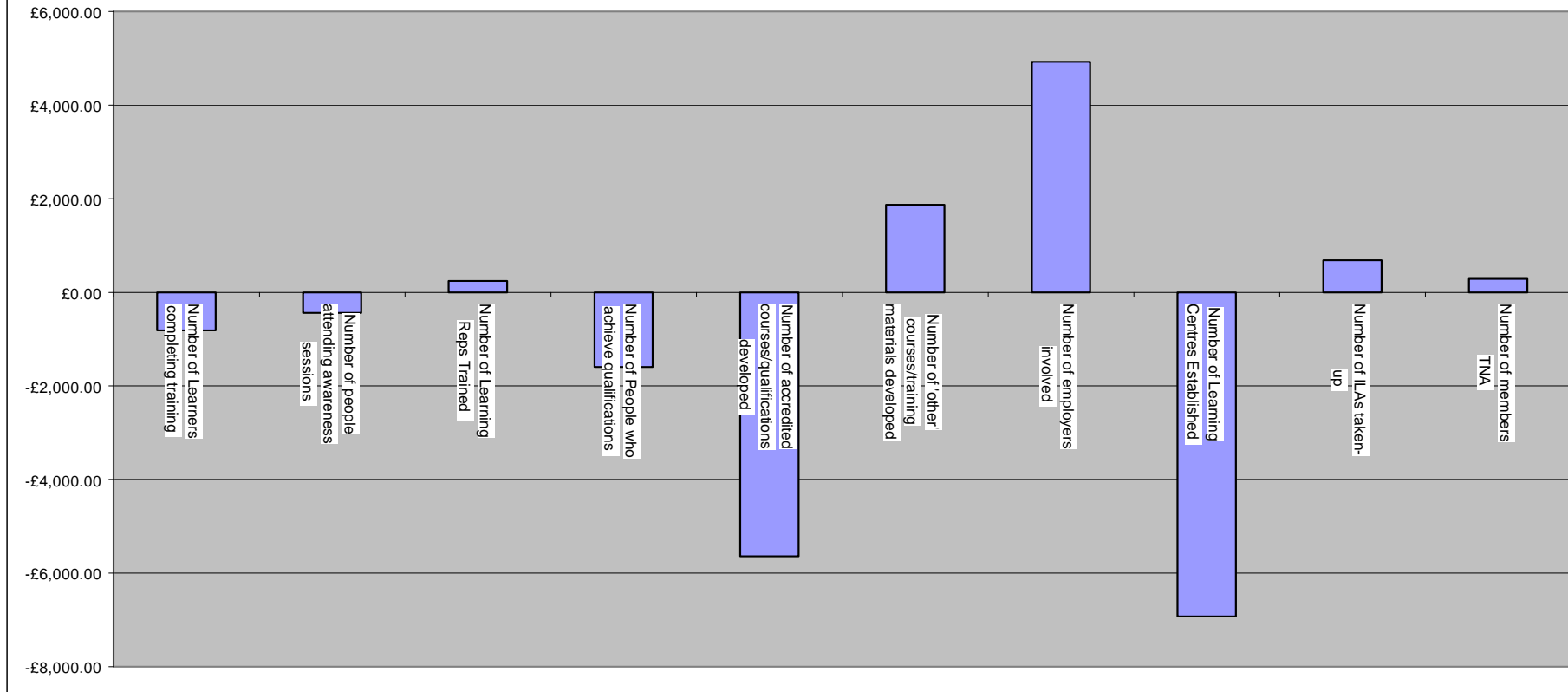
- 3.26 While the Round 2 projects have improved on the costs of key indicators such as learners completing training, number of accredited courses/qualifications developed and the number of people achieving qualifications, there must be concern over the rising unit cost of engaging employers and of training learning representatives. This is partly a reflection of the drop in the numbers of employers and learning representatives involved per project.
- 3.27 It should also be noted that many of the continuation projects undertook the 'groundwork' in Round 1 and hence certain development costs were incurred in the earlier project.

### Performance by Project Theme

- 3.28 The evidence coming from the quantitative analysis is that there is no significant link between the theme addressed and the success of the project in achieving its targets. Projects addressing different themes are almost equally likely to succeed or fail. There are indications from the more complete data from Round 1 projects that those involved in developing Learning Centres or Developing and Testing New Provision projects are slightly less likely to succeed in achieving their targets than those that focus on awareness raising and accessing existing provision. This is due to the inherently more challenging nature of the projects that required partnership development and specialist expertise. However, these projects, although less likely to achieve all targets and therefore more 'risky', include many of the more innovative aspects of activity supported by the ULF.
- 3.29 There is, however, evidence that the number of specific themes addressed by a project does have an influence on its performance. **Table 3.4** reports on the average number of themes addressed against the achievement of targets.

| Table 3.4: Range of Themes Addressed by Targets achieved |                          |
|--|--------------------------|
|  | Average Number of Themes |
| <b>Round 1</b>   |                          |
| All Targets Achieved                                     | 2.9                      |
| Less than 40% of Targets Achieved                        | 2.4                      |
| <b>Round 2</b>   |                          |
| All Targets Achieved                                     | 2.9                      |
| Less than 40% of Targets Achieved                        | 2.5                      |
| <b>All Projects</b>                                      |                          |
| All Targets Achieved                                     | 2.9                      |
| Less than 40% of Targets Achieved                        | 2.4                      |

**Figure 3.4:**  
**Change in Costs per Output - Round 2 to Round 1**



3.30 Table 3.4 shows that projects in Round 1 and Round 2 that have a broader focus of activities have been relatively more successful at achieving their objectives. The broader range of themes represents a more complete 'package' of learning activity, for example awareness raising, learning representatives training and access to ILAs.

### **The continuation of activities funded in Round 1.**

3.31 19 of the Round 1 projects were successful in bidding to ULF Round 2 for further funding. **Table 4 in Annex B** shows the outcomes of the 26 projects that did not seek ULF funding in Round 2, where project activities have continued the project is highlighted in bold type.

3.32 Project activities are continuing in a little under half of the 26 Round 1 projects that did not seek ULF funding in Round 2. Activities are continuing in the following ways:

- **through the training of learning representatives to continue workplace learning activities;**
- **through additional project funding secured from ESF and Adapt by the union or partners;**
- **through on-going learning programmes funded by the employer or FEFC;**
- **through the union appointing a full time post to further develop learning activities;**
- **through learning representatives and union officers continued promotion and utilisation of materials and (union office based) learning centres developed through ULF funding;**
- **through using the ULF project as a part of the development of a broader strategy for learning, as a development opportunity for a team of union staff developing learning services.**

3.33 The DfEE and the TUC may wish to consider the potential for encouraging those projects where activity has discontinued due to issues of internal capacity to be re-visited to assess whether there is any possibility of re-focusing or re-invigorating project activities.

3.34 Where project activities are not continuing this is due to:

- **slippage and lack of progress made during the ULF project;**
- **lack of linkage to the union, employer or other partners;**
- **for workplace based activity - a lack of commitment from a key employer to fund continuation activities.**

3.35 These findings highlight a number of the key success factors discussed in **Section 10**.

## 4 PROJECT MANAGEMENT AND IMPLEMENTATION

*"Things have gone much more smoothly this year with better planning, better communication and everyone being much clearer on what they had to do."*

### KEY POINTS

- *In Round 1 of ULF, many of the key workers were inexperienced in project management which impacted upon both the delivery of project activities and in planning for continuation. The management of Round 2 projects has improved with increased outputs per project and improved performance to target.*
- *A significant minority of projects have delivered short of their expected targets. The aspects of project management that remain relatively weak are project monitoring and evaluation. A number of projects have also underestimated the resources needed for the development of learning modules and learning centres.*
- *In a number of cases, project managers that gained experience in Round 1 have cascaded their experience to others through supporting and supervising new project managers and key workers.*
- *In a small number of cases project activities are 'provider-led' or 'employer-led' where the union has little direct contact with learners and no significant profile within the implementation of the project beyond the initial set up stages.*

### Project Management

- 4.1 In Round 1 of ULF, many of the key workers were inexperienced in project management which had a detrimental impact on the delivery of project activities and, in some cases, planning for continuation. The analysis of achievements in Section 3 has highlighted how, in terms of delivering outputs, **the management of Round 2 ULF projects overall has improved** with some improvement noted in the delivery of outputs to target and in learning outcomes.
- 4.2 Many ULF project managers stressed the benefits of having a clear plan and timetable for the whole project. One project manager noted:

*"having a one year project sounds like a long time, but when you take out the initial contracting time, key production dates and holidays, then think about the key things that need to happen before you can get learners into a course you realise that you need to get moving".*

- 4.3 Several project managers and workers also noted the benefits of the TUC's project management training which offered practical tips in project planning. The training and experience gained from Round 1 have helped to develop planning skills through 'critical path analysis' and ensuring that sufficient time and resources are devoted to the planning and preparation stages of the project.

### Strengths

- 4.4 An improvement in project management has been seen where the experience gained and the partnerships that developed during Round 1 has been the basis upon which continuation activities have been developed.
- 4.5 A key feature of successful projects has been an **effective steering group** involving key project partners. Partnerships have included colleges, employers, learners, reps and national and regional officers, TECs, NTOs and employer associations. The most effective partnerships have been where partners have **well defined roles**.

The **ASLEF** project **Developing Trade Union Learning representatives in the Rail Industry** included the union's general secretary on the steering group. His involvement in the project added weight to the project which aimed to involve all railway companies in learning representatives activities.

- 4.6 A further key feature of the management of many ULF projects has been the **development of relationships with providers** and the increased confidence of project workers to negotiate with colleges, recognising the strength of their bargaining power and working to ensure that provision is tailored to meet learner's needs.
- 4.7 Successful projects have also been **flexible** in their approach, responding to learners needs as they arise and based on on-going feedback from participants and learners.

- 4.8 The Round 1 evaluation noted that there had been little advance research undertaken and that this had affected many projects where, for example, projects had been overwhelmed by the demand created by awareness raising activities. In Round 2, many more projects have been based upon more solid information through either research carried out as part of Round 1 activities (such as employee surveys or training needs analyses) or on the findings and lessons learned from Round 1 project evaluation.

The **TGWU Skills Challenge in the Road Transport Sector** project in Round 2 was based upon the evaluation findings of a Round 1 project which found that three quarters of drivers had no formal qualification other than their driving license; half felt that they had not improved their skills in their current job; and over a third wanted to develop their basic skills. The evaluation gave the follow-on activities a clear basis upon which to develop.

### Weaknesses

- 4.9 Aspects of project management that remain weak are monitoring, resource planning and a lack of planning for continuation. There is a need to ensure that the **monitoring and evaluation is improved** to ensure that there is a strong basis for decision making during the project and planning for the future. This also enables project achievements to be clearly demonstrated to employers, the union, funders and others.
- 4.10 The extent and quality of project evaluation remains patchy. Many evaluations have been undertaken 'in-house', although externally commissioned work has not necessarily resulted in useful evaluation being delivered. The purpose and value of both process and impact evaluation is still not universally recognised and there is a need to **improve the quality and consistency of reporting project achievements, lessons learned and impact**.

The **BECTU Skillbase project** found that the appointment of an external evaluator added value to the project, helping to focus on the longer-term sustainability of the project. The evaluator will outline an exit strategy, considering how the programme can be streamlined and opportunities for further funding.



All **UNIFIs** projects have been evaluated by a union researcher that is independent from the specific projects undertaken. Each project report has followed a similar structure reporting outcomes against target and is based on follow-up with all participants including learners, employers line managers and other workplace colleagues. Each report also sets out the lessons learned from the project and implications for the union both in terms of the continuation of the specific project and the replication of the project elsewhere.

- 4.11 Collecting monitoring data for the purposes of day-to-day project management and for evaluation is not straightforward for many ULF projects, especially where data on 'outcomes' such as qualifications or the opening of an ILA is held by others such as a TEC or college. Projects have experienced difficulties of trying to track outcomes towards the end the project. This stresses the importance of the need to put monitoring in place at the initial stages of the project and agreeing how, if necessary, partners will contribute to the tracking of outcomes and achievements.
- 4.12 Some projects have also **underestimated the resources** and time needed for the development of learning modules, partnership working; managing national projects and in some cases gaining employer interest and commitment.

### **Project support**

- 4.13 In many cases these lessons are learnt by experience and currently the sharing of experience is mainly happening through advice and sign-posting from BfS and TUC staff. However there is **scope to further develop the sharing of experience** between ULF projects and ensuring that project managers are aware of others that have been involved in similar activities or faced similar problems and in the reporting of these issues in evaluation reports.

- 4.14 Bargaining for Skills teams have been involved in supporting almost all of ULF projects and worked with a number of specialist unions, that have not traditionally worked with the TUC, to bid to ULF. The impact of the support given to projects by BfS teams has been to improve the quality of the design and delivery of projects in many cases. Long-term support for BfS is, however, unclear. The on-going success of ULF will partly be determined by the ability of BfS to continue to give this support. The DfEE, therefore, needs to continue to work with the TUC to assess the potential for strengthening and augmenting BfS teams in the region.
- 4.15 Project managers have greatly valued the support and advice given in both designing projects and developing bids and with on-going support for the delivery of projects, for example through the provision of learning representatives training, advice on provision and 'opening doors' to TECs and other partners.

### **Project integration**

- 4.16 Section 3 discussed the 13 Round 1 projects where no further activity is ongoing. This group of projects have one or more of the following key features:
- **key project workers have moved on or returned to their workplace following secondment to a project;**
  - **in single employer based projects, the employer has not been committed to progressing activities due to for example site closure, or redundancies;**
  - **the project had weak links to other structures in the union or other partners including Bargaining for Skills or the TUC.**
- 4.17 External issues, such as site closure cannot be foreseen, but unions need to ensure that the design of projects and the composition of project steering groups help to ensure that the learning gained from project activities is not lost. So that, for example, project ideas and activities developed in one workplace can be transferred to others.

The **UNIFI** project **Partners in Education** ran in one workplace in Round 1. Further activities were planned but changes in key personnel led to the employer withdrawing its support for the project at the start of Round 2. On-going contact from the national education officer with the workplace rep that was involved in the first project means that as the employer has re-assessed the project and now wishes to consider running the programme again, the experience of the rep can be called upon to re-start the project when the employer is ready to move forward.

- 4.18 This requires not only good project management skills to ensure that the project activities are delivered, but that the project itself needs to be viewed as an opportunity to learn and **as part of a wider strategy** to develop learning services.

The **ISTC** project developing a basic skills network is part of a wider strategy within the union to address the basic skills needs within the membership that were identified in a Round 1 project. This has led to support from senior officials to progress a strategy to meet this need through working in partnership with providers.

### **Cascading experience and sharing good practice**

- 4.19 In several cases, project managers that gained experience in Round 1 have been more involved in **supporting and supervising new project managers** and key workers. However, the potential remains for the union to lose the skills that have been developed if project staff are on short term contracts or where external consultants are used. This has been addressed by some unions by creating more permanent posts.

The **AEEU** has appointed the project manager from their successful Round 1 Young People Project as Education Officer for the Union. He has overall responsibility for all of the Union's Round 2 projects, thereby ensuring a continuity of experience and improved co-ordination between projects.

- 4.20 Other unions have developed project teams that include secondees to help to ensure that the learning and skills developed are retained within the union or that expertise is brought in from, for example Bargaining for Skills Teams or other partner organisations.

**USDAW** have used secondees from the Bargaining for Skills Team in the North West with experience of running projects in ULF Round 1. This experience has been used to manage USDAW project workers also on secondment from their workplaces.

- 4.21 Recruiting staff and supervising new workers are key building blocks in developing union capacity. One potential limiting factor in expanding union learning is the availability of project managers and workers.
- 4.22 There remains a need to ensure, if project managers or workers have relatively little experience, that adequate arrangements are made with more experienced union staff to ensure:
- **training and supervision is put in place;**
  - **the project activities and outcomes are fed back to the union;**
  - **mechanisms are in place to share good practice between projects.**

## 5 LEARNING DELIVERY

*"You are the customer, you have the students, you know their needs – so negotiate."*

### **KEY POINTS**

- *Overall, in Round 2 projects unions have been more directly involved in the development and delivery of learning and key lessons are being learned about how to ensure quality and value for money from providers.*
- *There is limited innovation in 'new' learning delivery but by working with providers, unions have been promoting innovation through contextualising existing materials to make provision more relevant to learners, extending access to provision to part time and those who work non-traditional hours and spreading good practice from one context (sector) to another.*

### **Working with providers**

- 5.1 Only a small number of unions have, or expect to develop a capacity to directly deliver learning for members, therefore the majority of unions are working with providers, mainly colleges, to access learning opportunities for members.

The **AEEU's Beacon Centre** and **USDAWs ILAs in Humberside** projects had success negotiating with providers in the Humberside area. Through building a network of learning representatives and their ability to identify a large numbers of learners has given the unions considerable bargaining power and they have negotiated access to free computing courses for members and their families.

- 5.2 There has been an increased level of understanding of the services offered by colleges and the related funding/charging issues. Many ULF project workers have shown increased confidence and ability to manage the relationship with providers, working to ensure that provision meets the needs of learners in terms of location, time and pace of delivery and negotiating reductions in fees.

5.3 Important lessons learned by unions in working with providers were highlighted at a ULF seminar hosted by the TUC and NATFHE, at which unions identified the following key points:

- **there is not necessarily a relationship between the price paid and the funds a college receives. Unions can provide colleges with groups of learners and an income stream from FEFC funded units. This gives the union 'purchasing power' and colleges are willing to negotiate;**
- **accessing courses that can be FEFC funded is a way of sustaining learning and generates income for the college: ask what the college can offer to help unions encourage learners and widen the range of learners that participate in learning;**
- **there is a wide range of provision available: shop around;**
- **go for quality: check for continuity of staff and relevant experience of working with adults and in the workplace;**
- **ask for a copy of their FE student charter: give copies to your members. Make sure that they are aware of the services they should receive and that they have a right to this and to feedback if they are not getting what they expect;**
- **set out what you understand that all sides (learner/union/college) should get from the process.**

### **Innovation**

5.4 Innovation is a much used term. In the context of learning, innovation can be defined in terms of originality of learning content, new systems of learning delivery and new approaches to learning. The majority of unions involved in ULF have relatively limited experience of education and training and therefore the majority of learning programmes are not highly innovative in the terms defined above.

5.5 There are, however, a small number of unions with dedicated training and education teams or specialist unions with a remit that includes the professional development of members where there are some highly innovative projects: these include the matching of occupational standards to learning programmes, the development of ICT based learning materials with on-line learner support and the development of methods of self directed learning.

5.6 Although not highly innovative in terms of new delivery systems etc, many other ULF projects have involved unions working closely with college staff, who in some cases are delivering courses in the work place for the first time.

5.7 ULF projects are helping to ensure that good practice in learning delivery is achieved through, for example:

- ensuring effective (and appropriate) **initial assessment** is carried out to identify learners' existing skills, experience and aspirations and to ensure that learning programmes meet their needs;

In the **UNISON communications skills** project in partnership with Sodexho, the WEA worked closely with the employer and union reps to introduce the learning programme to potential participants and detailed initial discussions were held to identify learners needs and expectations. This helped to determine the level of communication skills held and shape the learning programme to suit the specific development needs identified.

- that course materials are **contextualised** to make course content more relevant to learners;

In **USDAWs** project to promote **ILAs in Humberside** the project worked closely with the local college to modify an existing 'Pathways' FE access course to meet learners needs and making course work examples more relevant to union members experience.

- working to ensure that college provision is delivered **at a location and time to suit learners**;

The **KFAT** project to develop **Communication Skills for Knitwear Workers** chose its provider (Manchester Adult Education Services) after speaking to a number of potential providers. MAES was selected because of its experience in the field (of ESOL), the proximity of the centre to participating factories and the multi-cultural atmosphere at the centre.

### Learner support

- 5.8 The role of the learning representatives is critical to the success of many ULF projects with reps. In a number of projects, unions have been developing specific aspects of learner support delivered either by learning representatives or others 'recruited' to the project to fulfil a mentoring or learner support role.

The **UNISON Developing Accessible Workplace Learning Centres** project has included the use of volunteer educational advisors (VEAs) who themselves have had a positive experience of returning to learning as mentors to the project participants.

The **NATFHE Teaching standards for Part time lecturers** project has also included training for mentors to support learners through their programme by using 'learning conversations' as a technique to help participants reflect on how they are applying learning in their job.

In the **TGWU Preparation for Key Skills for Security Staff at Heathrow Airport** project, Key Skills support workers have been trained. The project had faced some initial difficulties in recruiting a cross section of the workforce to act as support workers but this was addressed to help ensure that participants could be matched to a support worker that they could closely relate to.

- 5.9 Providing learner support is highly resource intensive, but has been effective in supporting learners, helping to motivate learners to complete courses, to reflect on their learning and to think about the application of the learning at work and to encourage learners to progress.

### Learner Progression

- 5.10 There is no overview of the extent to which learners supported by ULF projects progress into other areas of learning. There is some evidence from a small number of project evaluations of the impact of ULF on attitudes to learning.



A **UNIFI** evaluation has identified that five of the six trainees in one project had, on completion of the project, moved into new roles within their department. Line managers also report increased confidence and staff playing more effective roles as team members.

- 5.11 The type of follow-up work undertaken by UNIFI with learners and others in the workplace needs to be developed more consistently across other ULF projects.
- 5.12 Further participant follow-up is required of both the project and national evaluations to enable a more systematic understanding of the impact on learners attitudes to learning and progression into other routes and opportunities.

## 6 ENGAGING LEARNERS AND EMPLOYERS

*"The learners in this project are a group that effectively have had no voice. This project is redressing that imbalance and giving them a chance to acquire a voice and develop vital skills."*

### **KEY POINTS**

- *ULF projects continue to be successful in engaging non-traditional learners.*
- *Several projects have been successful in targeting those who work non-traditional hours including those working shifts, part time or on a freelance basis. However, difficulties remain in ensuring that these workers have access to learning opportunities or resources to maintain their learning activities.*
- *Only a small number of unions have, or expect to develop, a capacity to directly deliver learning for members, therefore the majority are working with providers, mainly colleges, to develop access to learning for members.*
- *A key feature of many projects continues to be the development and training of learning representatives, the unique feature of union based workforce development sustaining support for learning representatives is a key challenge. There still remains the need for union commitment to ensure that learning representatives activities are sustained in the longer term that in turn will help to sustain activities in the workplace.*

## **Learners**

### **Non-traditional or 'new' learners**

- 6.1 One of the key contributions that unions make to lifelong learning is their ability to engage non-traditional learners in learning. ULF projects continue to be successful in building confidence and motivating non-traditional learners. Many projects have been successful in reaching non-traditional learners, although a number of projects also realise that those with the least confidence and in need of greatest support may not yet have taken part in project activities.

The **KFAT** project worker noted that the project has reached the more confident and better English speakers, and the group had been almost exclusively male and reaching the target group with more limited English language skills and less confidence would be a priority for the next stage of the project.

- 6.2 Unions have been able to use the experience of those who have taken part in initial programmes to draw in the harder to reach groups. Word of mouth is a powerful mechanism for persuading learners that lack confidence. However, this also stresses the need for careful planning and building of the project infrastructure so that the experience of the first key group of learners is positive and motivates others.
- 6.3 Sustained activity is needed to build confidence, demonstrate benefits and reach out to those least likely to take part in learning activities. Monitoring needs to be developed to ensure that unions and project partners understand the profile of their target group and whether this group has been reached.
- 6.4 In asking projects for data on project activities and outcomes it has been noticeable that many projects have not been able to monitor the number of 'new' or non-traditional learners taking part in projects or the characteristics of learners such as age, gender or ethnicity. Reaching and supporting non-traditional learners is a unique feature of union based learning. This means that being able to quantify the proportion of project participants that are 'new' to learning or without formal qualifications is a powerful tool in helping to make the case for further support from funders, employers and other partners.

### **Professional Staff**

- 6.5 Although attracting non-traditional learners is a key feature of the achievements of ULF as a whole, it must not be forgotten that specialist unions have also had notable successes in developing access to provision and promoting continuing development amongst professional workers including teachers and nurses. Unions such as the NUT, RCN and NATFHE have traditionally had a role in promoting the continuing professional development of members and ensuring that employment terms reflect skills levels. But the Union Learning Fund has enabled these unions to become more actively involved in the delivery and development of CPD learning opportunities to members.
- 6.6 A notable feature of these learning projects has been the ability of unions to offer access to learning to professionals who work non-traditional hours such as part time and freelance workers, that are often excluded from learning opportunities or to develop pathways within CPD programmes.

The **NATFHE** project has introduced the FE NTO national standards into the design and delivery of opportunities for part time lecturers. Pilot projects run with 2 colleges and overseen by a steering group that includes the NTO, the Association of Colleges and FEDA have demonstrated the demand for both initial qualification and on-going development of new and experienced part-time staff.

The **RCN** project has developed partnerships in the independent sector to reach a group of nurses that have not traditionally been involved in the CPD programmes offered by the union.

### Those who work non-traditional hours

- 6.7 Although classed as 'non-traditional' hours, shift, freelance, part time and casual contracts are on the increase and it is well documented that workers in these occupations have less access to formal training opportunities. Several ULF projects have been successful in targeting workers in this group including BECTU, TGWU, USDAW and TUC South West projects. The TUC South West project has published a report of their project, good practice and lessons learned.

Many of the learners in the **TGWU Skills Challenge for the Road Transport Sector** work long, irregular hours and in shifts. The project has addressed this problem in a number of ways including delivering courses from the union's offices on a Saturday morning, and delivering courses at the workplace after outfitting a bus as a mobile learning centre. In addition the project has negotiated a deal with City College Manchester that allows many of the courses offered to be accessed via distance learning methods for members.

- 6.8 Key success factors in meeting the needs of these workers include having a flexible model to fit around the needs of for example freelance learners who need to take-up work opportunities as they arise or the needs of shift workers. Designing successful programmes includes consulting and involving these workers on the development of the model and working closely with provider to ensure that they deliver programmes to meet these needs.
- 6.9 However, difficulties remain in ensuring that those who work non-traditional hours have access to learning resources and support from reps and tutors to help sustain their learning activities.

### **Minority Groups**

- 6.10 Four ULF projects have had a specific focus on workers in minority groups that face significant barriers to learning. These are the CWU project working with the profoundly deaf, the KFAT communication skills project, the IMPS project targeting the development of Black and Asian engineers and the GMB Connect-up to Learning project delivering English language support to those interested in becoming union reps.
- 6.11 There is considerable scope to disseminate the outcomes and lessons learned from these projects to other unions and key partners as examples of the way in which the development of minority groups can be supported in the workforce. There is now a specific focus on ensuring equality of opportunity in people development within the revised liP standard. The learning from ULF projects that have targeted minority groups and others that are often excluded from learning opportunities could be more widely disseminated to liP committed and recognised employers to promote good practice in addressing the needs of these groups.

### **Learning representatives**

- 6.12 A key feature of many projects facilitating access to learning, is the development and training of learning representatives. In Round 1 of the ULF 19 projects included learning representatives training. Although Round 2 has had a greater focus on learners, in Round 2, a further 25 projects have involved learning representatives training. This has involved unions rolling out learning representatives training to involve reps from other regions.

The **AEEU Beacon Centre** project has rolled out the learning representatives training developed on Humberside during ULF Round 1 in six more regions to encourage, support and train union 'learner representatives', evaluate their role and embedded it into AEEU mainstream activity.

- 6.13 A number of learning representative training activities have included the development networks of support for learning representatives and developed training, beyond the initial front line advice and guidance programme. This includes (across different projects) training to support basic skills learners, NVQ assessor training and presentation training.

In the **CATU Pathway to learning** project participants in the learning representative training have been equipped to make presentations to their employers and gain their support for further learning activities. One employer now wants to introduce learning representatives in other factories.

Through the **MSF** project **Promoting NVQs Through Learning representatives**, union learning representatives are established in Legal and General, Royal Sun Alliance, Norwich union and Prudential. An MSF Finance Sector Training Sub-group made up of union learning representatives has been established to co-ordinate and support lifelong learning initiatives across the finance sector.

- 6.14 The York Consulting survey of learning representatives on behalf of the TUC has highlighted that extent to which learning representatives require on-going support after initial training to ensure that their impact in the workplace is maximised. The research points to the need for union support to ensure that learning representatives activities are sustained in the longer term. This requires on-going dialogue with employers to ensure that they recognise and value the work of learning representatives.

- 6.15 A third of learning representatives surveyed report that they have been very successful in engaging new learners and had a significant impact in their workplace on the learning culture and motivation. However, there is a significant minority of learning representatives who find that the lack of employer support through time off for learning representatives training, duties, or for learners to take up learning opportunities, is still a major barrier to their work.
- 6.16 Developing support for learning representatives through rep networks, gaining employer commitment and union support for the role needs to continue to help ensure their activities can be sustained.

## **Employers**

- 6.17 A little over half of all projects have employers as key partners and involve specific work-place learning activity. Getting the balance right in terms of employer involvement and support is a key feature of successful ULF projects. There is a need to balance:
- **gaining employer commitment and recognition of the work of learning representatives, releasing staff, integrating ULF learning activities with other staff development processes;**
  - **ensuring learners recognise the initiative as 'union-led' to ensure that the value added that unions bring to workplace learning (see Section 9) is maximised;**
  - **ensuring that the learning funded by the ULF does not subsidise learning/training activity for which the employer should take responsibility.**

## **Employer support for union learning activities**

- 6.18 The degree of support from employers has varied considerably. This ranges from those employers that are true project partners actively and directly involved in the development of projects, giving time off for learning and contributing to the funding of learning. In some projects employers have been 'passive' participants and in a small number of others, employers have been regarded as obstructive.

- 6.19 Projects that have been able to successfully gain employers early commitment have often **entered into a dialogue with employers at a more 'strategic' level**. These projects have spoken to senior staff in the employing organisation with the authority to make decisions about staff time off for learning. This dialogue needs to be set out the benefits of learning by all in the organisation.
- 6.20 A number of projects have also developed union learning activities within the context of an organisation's work under the Investors in People standard. Section 2 reported examples of these projects and the way in which union learning activity can be integrated into liP.
- 6.21 Projects have generally found the small employers difficult to engage, however others report that some very large organisations have not been receptive to approaches from unions and engaging their support has been slower than expected and required on-going effort. Work undertaken by the GPMU (South West and Nottingham) and KFAT projects has been successful in engaging small employers. In a number of instances the benefit gained by the employers has been considerable. One small firm in Dorset reported that:
- 'The GPMU and their training [package] has kept this company from going under - we could not have afforded the training and did not have the expertise we needed'.
- 6.22 A number of projects have 'stalled' or been less successful than anticipated because of withdrawn (or 'cooling off') employer support after an initial commitment or after key personnel have moved on. This experience has highlighted the need for:
- **involving employers at an early stage, explaining the project benefits and process clearly;**
  - **ensuring, where possible, that there is more than one 'stakeholder' within the firm;**
  - **assessing the risk of 'single employer' projects and where this risk is high, developing project models that are not solely reliant on the good will of one employer and where the learning from one project cannot be transferred elsewhere.**



### Working with others to engage employers

- 6.23 Where there has been no employer involved at the outset, several ULF projects have been successful in gaining access to employers through working with employer organisations such as trade associations. Successful joint working with employer organisations requires a clear understanding of the role of each partner and explaining this clearly to employers at the outset.

### Working without employer support

- 6.24 It is a noticeable feature of the more successful projects and where activities have been sustained from Round 1, that employers have been mainly supportive of the ULF work-based project. There has been a small number of projects that have targeted members directly to 'by-pass' employers where employers have not shown any interest in a project and offer learning opportunities direct to members outside of the workplace. Examples include projects led by UNIFI and NUT.

The **UNIFI** project **Building Partnerships in Lifelong Learning** extended a project model developed with UNYSIS in Round 1 across three more regions. The project has been successful in establishing the programme at four colleges for UNYSIS employees in these regions. The project was initially less successful in attracting new employers to be involved in the project to offer the ICT level 4 programme to members, with one key barrier being the amount of staff time involved. In response, UNIFI offered the programme directly to members and, of the 22 initially interested, 17 have completed the first 'individual' programme. UNIFI will use the evaluation of the outcomes of this group of independent learners to promote the benefits of programme to employers. Negotiations with two other employers are now well advanced, but the time taken to secure employer commitment has been much greater than anticipated.

### Union added value in engaging employer support

- 6.25 Securing employer commitment to learning is a challenge that providers, TECs, NTOs and DfEE have sought to address for many years. The **added value that unions can bring to influencing employers** has been to :
- **make employers aware of the types of learning activities taking place in similar companies and close competitors;**

- **highlight the specific needs of those within the workforce who have traditionally been excluded from learning;**
- **build the confidence and motivation of learners who might be intimidated by employer-led initiatives.**

6.26 The experience of the **CWU and BT** in the **Partners in Resource Analysis and Re-skilling** project has led partners to agree that the joint approach is a positive way forward. The employer has agreed that the project has laid the foundations for further working and as one manager noted:

- **'the Genie is out of the bottle and the company and the union should work to develop this strategy for the future'.**

### **Longer term commitment to union learning**

6.27 In a number of cases ULF projects activities have contributed directly to the union and employer developing or strengthening recognition and learning agreements, or establishing learning committees to take the learning activities developed under ULF forward.

The **RCN** project **developing professional facilitator network** has focused on offering CPD opportunities for nurses in the independent sector. The successful outcomes of the projects have been a contributory factor to consideration now being given to recognition agreements with two major employers and led to increased membership of the union from nurses working in the private sector.

The **Unison/Sodexho** project steering group agreed to continue to meet as a 'learning committee' to develop further learning opportunities for the learners that had been involved in the basic skills project. This included, for example, proposals to introduce UNISON's Return To Learn programme in the region.

## 7 BASIC SKILLS PROJECTS

### KEY POINTS

- *The group of basic skills projects have made good initial progress in developing structures of support in a limited period of time. However, the extent to which learners with basic skills needs have been engaged in learning has been below that expected. This has highlighted that the support needed by this group of learners is qualitatively different from the more general “return to learn” client group.*
- *The methods of 'recruitment' to basic skills courses that have been explored provide a range of good practice 'tips' and models. This good practice needs to be disseminated widely both to unions and others that are seeking to address basic skills needs.*
- *Unions have developed their understanding of basic skills and the provision offered. Many have found that providers, whilst having good basic skills tutors, have limited experience of delivery in the workplace, and therefore need to work closely with providers to ensure that the content and delivery meets learners needs.*
- *Although initial assessment of learner needs is taking place there is not a systematic recording of the level of need or the progress made by 'basic skill' learners. It is too early to measure the impact on learners in terms of progression into other learning.*

7.1 Round 2 of the Union Learning Fund had a specific focus on addressing issues raised in the Moser report on basic skills at work. Nine projects were funded specifically to addressing Basic Skills, a further four 'general' ULF projects have a basic skills element.

7.2 The Union Learning Fund also supported the TUC, working in collaboration with the Basic Skills Agency, to provide advice and support to projects developing this area of work. This work has included seeking to embed basic skills projects within mainstream funding and support mechanisms and linkages with local or sectoral basic skills initiatives, sharing the good practice developed by early projects and advising projects on how to access good quality provision.

### Project Achievements

7.3 The projects have, on the whole, had to work on a shortened (six month) time-scale and this is reflected in the results to date. Collectively the projects have not met their targets for learner outcomes.

- 7.4 In retrospect, the basic skills project managers and the TUC/BSA support team recognise that many of the numeric targets by unions set for learners were over ambitious given the short timescales. It was also found that several projects did not initially build in adequate time and resources to develop the infrastructure (including agreeing methods of 'recruitment', locating an appropriate provider, developing contextualised materials and setting up the learning programme) needed to develop a successful programme.
- 7.5 The BSA advisor finds that overall, the project achievements in terms of the structures developed and the learner outcome are commendable, when compared to the achievements of other, similar, initiatives.
- 7.6 The TUC/BSA support team also found that initial targets for the volume of learners needed to be revised as projects reviewed their plans for developing the basic skills learning infrastructure within the project. The analysis of achievements shows that although learner outcomes have been below initial targets, there has been considerable progress made in establishing structures and provision.
- 7.7 The challenge remains, however, to ensure the further progress is made in ensuring that adequate numbers of basic skills learners are supported into learning activities and that learning can be sustained in the longer term. The following sets out the achievements of the basic skills projects and the features of projects in terms of partnerships developed, methods of engaging and supporting learners and working with employers to address basic skills.

### Building Structures

- 7.8 **Table 7.1** outlines the results of work undertaken by the basic skills projects in building structures to support the identification of basic skills needs and basic skills learners. The types of activity under this heading include the further training of learning representatives to identify and support basic skills needs and the design of appropriate materials and courses.
- 7.9 In designing basic skills courses and materials, unions have been working closely with colleges and ESOL providers to 'contextualise' learning materials to make them more relevant to member's needs and their experience through for example developing course materials based on real work-place activities.

| Table 7.1:<br>Basic Skills: Structures in Put in Place          |        |        |
|---|--------|--------|
|   | Target | Actual |
| Number of learning representatives trained                      | 142    | 115    |
| Number of accredited courses/qualifications developed           | 1      | 9      |
| Number of 'other' courses/training materials developed/accessed | 1      | 1      |
| Number of Learning Centres established                          | 1      | 1      |

7.10 The development of materials has also included the development of initial assessments used by providers to identify basic skills needs and levels.

7.11 The basic skills projects have been successful in putting structures in place, notably in developing basic skills courses and materials provision. The total number of learning representatives trained to support basic skills projects has not yet reached its target but is expected to in the near future.

### Basic Skills Learners

7.12 **Table 7.2** shows that Projects have been less successful in reaching their targets for the number of learners involved. The re-focusing of projects to ensure that an appropriate and sound infrastructure was developed has led to a lower level of learning activity than expected. Some projects stated that they have found that 'recruiting' learners with basic skills to take part more difficult than expected, and consequently the number achieving qualifications has been less than expected. In addition, the proportion of all basic skills learners achieving a qualification is less than expected (56% expected, 43% achieved).

7.13 Some projects also report that they needed to revise their initial targets for learners, not because of a lack of interest or difficulties in locating potential learners, but because initial work had identified a much greater level of demand for basic skills than had at first been expected (notably the KFAT and USDAW projects). This has led these projects to put more emphasis on building the infrastructure through training learning representatives and carefully managing the expectations of potential learners to help ensure that these expectations can be fulfilled.

**Table 7.2:**  
**Basic Skills Projects: Learner Outcomes**

|   | <b>Target</b> | <b>Actual</b> |
|---|---------------|---------------|
| Number of learners                          | 807           | 334           |
| Number of people who achieve qualifications | 390           | 190           |
| Number of ILAs taken-up                     | 100           | 50            |

### **Assessment and Awareness Raising Activities**

- 7.14 **Table 7.3** shows that an area of success for the basic skills projects had been in raising awareness of basic skills issues. Over 400 people have attended awareness sessions and there has been a greater number of employers involved than expected. Where projects have been relatively more successful in engaging learners, project design includes one or more of the following: awareness raising sessions, taster courses, or learning representatives with further training to recognise basic skill needs.
- 7.15 Where initial assessments of learners have been taking place, this information has been used to tailor provision. Project workers and providers indicate that the majority of learners have level 1 basic skills needs, rather than entry level. However, there is little systematic collection of data by project managers on the level of basic skills need and monitoring of the progression made by individual learners in improving their basic skill levels of learners that have accessed ULF programmes. Developing data on the profile of basic skills learners (level of basic skills need, age, gender, occupation) will add to a union's understanding of the profile of basic skills needs within the union and the extent to which target groups are being reached.
- 7.16 A number of projects report that during this initial stage it is likely that participants are those with better levels of basic skills and have more confidence to address them. Much of the groundwork has been put in place but further targeting of those with the highest levels of basic skills need is required to ensure that workers in this category have opportunities, support and confidence to take part in learning programmes.
- 7.17 The basic skills projects exhibit many of the characteristics of the Round 1 ULF projects in that the initial year has focused on getting structures.

**Table 7.3:**  
**Awareness Raising and Needs Analysis**

|   | Target | Actual |
|---|--------|--------|
| Number of people attending awareness sessions | 200    | 398    |
| Number of employers involved                  | 41     | 50     |
| Number of members TNA                         | 750    | 613    |

## Partnerships

7.18 The support given by the TUC and Basic Skills Agency has helped unions to link with possible providers and other partners. Many projects also build on existing partnerships, for example those that had worked on ULF Round1 projects that had identified basic skills as an issue for member or reps. **Table 7.4** shows the range of project partners involved in steering groups and the delivery of the projects.

7.19 A number of projects have faced a steep learning curve, particularly in working with providers and making decisions about which provider to use and how to work together. Projects report on difficulties faced in selecting providers, being faced with a wide range of basic skills materials and courses, but little confidence to know which would be best for their clients. Some projects have felt that the materials, approach and tutors used by even 'kite-marked' providers (either BSA accreditation or a favourable FEFC inspection report for Basic Skills delivery) needed to be developed further to meet the needs of ULF project client group, to ensure appropriate delivery in the workplace.

**Table 7.4:  
Basic Skills Project Partners**

|                       |    |   |
|-----------------------|----|---|
| Employers             | 23 |   |
| FE Colleges           | 16 | North East London, Stoke-on-Trent, St. Helens, Bournemouth & Poole, Southampton CAT, Gloucestershire CAT, Filton, Plymouth, Rotherham CAT, Manchester CAT, Knowsley, Wigan and Leigh, West Cheshire, Wirral Metropolitan, South Nottinghamshire, Matthew Boulton colleges |
| Other providers       | 4  | Manchester Adult Education Service, WEA, Steel Partnership Training, In-House Services limited (EAL)  |
| TECs                  | 11 | North London, Staffordshire, Westec, Propser, Dorset, Gloucestershire, Somerset, The Link, Wiltshire, Rotherham Economic Partnership, Greater Notts. TEC  |
| TUC/BfS teams         | 4  | London, North West, North East, Norfolk & Waveney   |
| Employer Associations | 3  | Ceramics Confederation, Manchester Knitwear Association, British Printing Industry Federation   |
| OCN                   | 3  |   |
| Others                | 3  | Basic Skills Agency, North London and Lee Valley Open Learning Partnerships   |
| Other TUs             | 3  |   |
| NTOs                  | 1  | Print and Graphic   |

## Engaging Learners

7.20 A key feature of projects that have been relatively successful in involving learners is the involvement of the union, reps and employer working closely to develop the learning programme. Engaging learners has been more difficult than expected, compared for example to the success that 'general' ULF projects have had in encouraging people into learning. In addition to the increased focus on developing infrastructures, the experience of the basic skills projects highlights that the needs of basic skills learners in terms of confidence building and support are in some ways different to the needs of 'return to learners'. Critically, many people with basic skills needs will have adopted strategies to hide this and will need to be reassured that admitting basic skills difficulties will not pose a threat to them.

7.21 Developing the confidence of those with basic skills needs, making them aware of project opportunities and persuading them of the benefits of improving their basic skills **has** been achieved through developing approaches in the workplace that can reach this group. Successful approaches have involved:

- **the 'branding' of projects as IT or communication skills courses and not referring at any point to 'basic skills';**



- not relying on paper based materials to promote courses;
- working with reps to informally encourage those that they know to have basic skills needs to take part;
- introducing providers in a relaxed and non-threatening environment;
- employers being supportive of the project but taking a low profile to help ensure that workers with basic skills needs do not feel compromised by coming forward.

The **UNISON** project developing **Communication Skills in the Healthcare Sector** has worked in partnership with the employer, through both line managers and the personnel manager, workplace reps and the provider. Initial sessions were held on a number of occasions and on a very informal basis during lunch hours etc. Holding these sessions a number of times offered workers with less confidence time to think and build their confidence to come forward.

7.22 Where projects have been less successful in engaging learners, the union has not been so directly involved in encouraging colleagues with basic skills needs to take part in learning. This includes projects where the employer (training managers) or the provider have been those with the main responsibility for engaging learners.

7.23 The involvement of employers has been mixed, with a small number of employers that were originally involved withdrawing their support where their understanding of the project was not clear. A number of projects have found that working with an employer organisation to develop initial contacts with employers has been a positive way overcoming employers concerns and seeing basic skills as a both a competitiveness issue and one that needs to be tackled in partnership.

The **KFAT Communication Skills** project worked in partnership with the local trade association and the adult education provider in going into work places to gain initial employer support and then to raise awareness of the project with employees, establishing their interest.

## Making the case - engaging support

- 7.24 A number of the basic skills projects have been directly involved in 'making the case' to both employers and others in the union regarding the need to address basic skills and how to successfully achieve this.
- 7.25 A number of projects have found that some union colleagues have not been convinced that the remit of the union should extend to developing support for basic skills learners. However, officials and reps have found the evidence collected by some ULF projects on the level of basic skills needs in the workforce compelling.

One aim of the **ISTC Basic Skills Support Network** project has been to ensure that the issue of basic skills is recognised as part of the union's agenda, through for example inviting the General Secretary to the project.

- 7.26 The project funding model can be used as a way of engaging support. For example, in the **KFAT** project each key stakeholder was asked to contribute to the funding of the programme. Employers in the sector are known to be operating on very low margins and it was felt to be unrealistic to expect them to pay for the full cost of the training, therefore the employer, the project, the provider and the individual all contributed with either cash or time. This project has been able to give employers direct feedback on the benefits of the communication skills training given to learners as the quality of communication by phone with these companies has noticeably improved. Both in terms of the way in which callers are greeted and the precision with which messages are taken and passed on. Giving this feedback to the employers helps to gain further support for a continuation of activities.

## Learner Support

- 7.27 Two projects that have been relatively successful in 'recruiting' and retaining learners have learner support built into the programme design. These 'mentors' are not the basic skills tutor, but another work-based colleague trained to give support to and motivate the learner.

The **CATU Pathway to learning** has involved learning representatives having additional training from a guidance tutor and this has been seen to significantly help the initial process of identifying those with basic skills needs, and in reps encouraging them to take part in the basic skills programme. The college has found that 90% of those referred to the college have been referred at the appropriate level by the learning representatives.

The **T&GWU Preparation for Key Skills** project at Heathrow Airport has trained unions reps as 'Key Skills Support Workers' to identify those with basic skills needs and to offer advice and guidance to these individuals. In addition, learners have been assigned a 'basic skills coach', a member of the company that has been through a City and Guilds Basic Skills course, who works with the learners on a one-to-one basis.

## Learner Progression

- 7.28 Given that many of the basic skills learning programmes were delayed in starting and many learning programmes were not complete, there is currently no overview of the progress made by the basic skills learners. Case study work and some project reviews has indicated the positive benefits for learners in terms of increased confidence and motivation, with anecdotal evidence of the business benefits, such as the KFAT example noted above.
- 7.29 It was noted that data on learners from initial assessment was not systematically collected by unions from providers. Similarly, data on learners outcomes and achievements is not necessarily collected. Issues of confidentiality need to be upheld, but monitoring data needs to be passed from providers to union project workers to ensure that information on outcomes and progression can be accessed and used to plan for continuation and to make the case to employers and others of the benefit and impact of basic skills project work.

## Capacity Building

- 7.30 Union capacity to manage basic skills projects has developed in a number of ways, although it is too early to measure the extent to which this can be sustained, project managers and workers report on how they have developed their understanding of how basic skills needs can develop and how to put together a package of support for learners.
- 7.31 Key issues that have been addressed are ways in which individuals with poor basic skills are made aware of the programme and how to create an environment that encourages them to participate. Other key lessons learned are how to work with providers and the need to retain control and overview of the delivery of the programme to ensure that it meets learners needs. Many colleges, for example have found that although they have experienced basic skills tutors, there are few that have experience of delivering in the workplace.
- 7.32 Although there is scope for improving the quality of information collected and reported on the basic skills needs and achievements of learners, the ULF projects have been collecting a body of data on basic skills in the work-place which would be of benefit to others seeking to address basic skills. Unions need to further develop the information collected and disseminate further information about the needs of basic skills learners in their sector.
- 7.33 Although projects have encountered some difficulties, they have achieved greater success in reaching this target group than many providers and employers that have previously attempted to address this issue. In this context, ULF pilot projects have demonstrated the benefits of a union-led approach and of working in partnership with providers and employers to reach non-traditional learners with basic skills needs. The achievement of the first year of basic skills projects has been to establish infrastructures to put projects in a strong position to deliver basic skills learning outcomes in 2000/01.

## 8 IMPACT OF ULF ON UNIONS

*"The project has already had other valuable outcomes: a previously neglected sector is getting the attention it needs and the union has gained invaluable experience and entered into some important new partnerships."*

### **KEY POINTS**

- *Union capacity has developed through improved project management and builds on the experience of delivering projects in Round 1 and the existence of stronger relationships with providers and other partners.*
- *Round 2, especially 'continuation', projects have tended to be more complex, this includes developing 'packages' of learning support.*
- *However, there is a lack of planning for sustainability and the vast majority of projects have relied on the ULF for continued support, and there has been limited integration of activities with other 'mainstream' post-16 initiatives.*

### **Impact of ULF on Unions**

- 8.1 The Round 2 evaluation has not focused systematically on the impact of ULF on unions, however, one expected outcome from the Round 2 evaluation are recommendations as to how longer term impacts can be measured. This is discussed in **Section 12**.
- 8.2 The evaluations of Round 1 and 2 have found some evidence that impacts are being achieved, however there is no systematic measure and this is not an area that is necessarily reported on by unions' own ULF project evaluations. This section shows examples of how ULF project activities impact on unions. These are presented under the following headings:
- **raised awareness of the union or increased membership;**
  - **increased capacity to deliver learning services;**
  - **unions responding to the learning agenda through the creation of new structures and strategies to achieve this;**
  - **other agencies (colleges, TECs, NTOs, universities) being more likely to want to work with unions to help achieve their lifelong learning objectives.**

### **Awareness of the union, increased union activity or membership**

- 8.3 The direct relationship between union learning fund activities and increased awareness and interest in the union or the retention of members cannot be measured. However, several projects report that these impacts have been observed. Some ULF projects have purposefully targeted workplaces with low union density (for example the RCN project) or offered learning opportunities to non-members, with the aim of attracting new members.

The **ALAE** project has focused on raising the profile of CPD across the membership through the promotion of learning programmes through the union's magazine. The union project manager reports that following publication of articles, applications for membership have increased and during the lifetime of the project the membership has increased from 1,750 to 2,200.

The participants learning programme for part time lecturers in the **NATFHE** project based at Solihull college noted that their perception of the union had improved as a result of the project. One participant, who was already a member, became more active within the branch, and had a particular interest in taking forward issues relating to part time colleagues.

- 8.4 Case study consultations with members have confirmed that learning projects improve their perception of the union and members support the development of learning services as an addition to the other services offered by the union.

### **Capacity Building**

#### Capacity to manage learning projects

- 8.5 There is evidence of an improvement in the capacity of unions to manage projects from the analysis of performance in Sections 2 and 3. These include:
- Round 2 projects being more directly involved delivering learning activities. Round 2 projects also include a wider range of activities, especially 'continuation' projects that have tended to be more complex, covering a broader range of activities or involving a larger number of learners;

- **some improvement in project management**, which in many cases builds on the experience of delivering learning in Round 1 and is evident in the increase in the number of learners per project and the reductions in cost per output;
- despite the fact that some projects faced initial delays in contracting with the DfEE, Round 2 project activities, with the exception of many the basic skills projects, were able to **establish project activities relatively quickly**;
- through the training of learning representatives in Round 2, there has been both an increase of the number of learning representatives but also in some cases **a widening of the role of union reps** and a deepening of their skills base:
  - the widening of the learning representatives role includes providing learner support and working at a more strategic level to influence employers;
  - the deepening of learning representatives skills includes developing mentoring and presentation skills.
- however, it is also noted that on-going mechanisms of support are needed to ensure that the capacity that has been developed is sustained for example by ensuring that learning representatives have access to updated information on learning initiatives and access to further training to develop their skills.

#### Capacity to deliver learning services

8.6 A wide range of ULF projects have built union capacity to deliver learning services directly to members. This includes:

- **developing on-line learning programmes (Whitehall On-line: MSF);**
- **developing ICT/learning centres (e.g. GPMU Learning Zone, ASLEF, TGWU North West);**
- **developing union specific learning programmes/materials (e.g. NUT Computing skills for Teachers, NUJ Computing skills for Journalists, ISTC Rapid Response to Redundancy);**
- **developing union reps as NVQ assessors (e.g. UCATT).**

- 8.7 The extent to which unions can resource and sustain direct delivery of learning services is mixed and depends upon the resource and remit of the union. Continued emphasis needs to be placed on planning to ensure that services can be sustained and further developed to meet the needs of the membership.

#### Capacity to influence sector learning initiatives

- 8.8 Some unions, notably smaller or sector specific unions have focused on working with key sector partners to develop projects which seek to influence national sector learning initiatives. Unions which have traditionally had a remit to promote CPD across the membership have worked with other sector partners in the development of learning programmes and pathways for members, potential members or those traditionally excluded from CPD programmes. These include:
- **NAPO working with the Community Justice NTO in the development of a new qualification route for members;**
  - **NATFHE working with the AOC and NTO to develop initial qualification and CPD programmes for part time college staff. This project has also helped to lay the foundations for similar initiatives with the NTOs that cover HE and Adult Learning occupations.**

#### **Developing structures and strategy**

##### New staff

- 8.9 Ten unions mention some form of impact in terms of the appointment of new posts or the development of a longer term strategy for learning services for members. New 'learning' posts have been created, or are planned, in the AEEU, BECTU and UNIFI.



Developing the dialogue on learning inside the union

- 8.10 There is evidence that the level of debate about the role of a union in learning has increased with unions reporting an increase in debate on learning/training at national executive level, at conference and through new or re-invigorated training committees. The lessons learned from some ULF Round 1 projects has led to unions developing a more strategic response to the issues raised. For example **ISTC** projects are part an overall strategy being developed to create a 'Union for Life' of which training and development of members is seen as a key element.
- 8.11 The extent to which unions are responding at the strategic level is mixed with a small number of ULF projects still working in relative isolation from other union structures such as regional or national offices. This situation is more likely to be the case where project activities are effectively 'provider-led' or 'employer-led'.
- 8.12 Continued emphasis needs to be made both through the ULF bidding process and TUC support for projects, to ensure that projects have strong linkages to other union structures and have support from others in the union. Furthermore, that through the project management tools, such as steering groups, evaluation reports and dissemination events are used to engage senior union staff in project activities, their outcomes and the implications for the union in sustaining activities.

Bidding for other funds

- 8.13 A further indication of the increase in union capacity has been a noticeable improvement in the quality of proposals made to the ULF Round 2 and 3. Again, this has been supported by advice from BfS and TUC Learning Services but both unions and the TUC note that the kind of support given has been less on the initial concept and design of projects and more focused on pointing Unions to examples of good practice in considering potential providers.
- 8.14 There has also been a small increase in the number of bids made to other sources of external funding including Adapt, ESF, Ufi, and the Dti's Partnership fund but the ULF remains the main potential source of funding to which unions are looking to sustain activities. **Table 8.1** shows examples of 10 projects in Round 2 that have levered in the greatest amounts of additional funding.

**Table 8.1: Sources of Leverage**

| Project Title   | Union              | ULF Funding | Leverage    |
|---|--------------------|-------------|-------------|
| Developing a Trade Union Employability Service                          | TUC NW             | £49,340.00  | £138,000.00 |
| PCS Key Skills Learning Centre  | PCS                | £50,000.00  | £92,000.00  |
| The Learning Champions of Derbyshire                                    | AEEU               | £40,000.00  | £63,000.00  |
| Maestro Project   | MU                 | £52,000.00  | £63,000.00  |
| The Learning Zone   | GPMU               | £38,500.00  | £46,000.00  |
| Developing Accessible Workplace Learning Centres in the Public Services | UNISON             | £43,325.00  | £43,920.00  |
| Internal Development Project – UNIFI and Coventry Building Society      | UNIFI              | £19,000.00  | £41,000.00  |
| Editorial Computer Skills Training Programme                            | NUJ                | £57,000.00  | £35,000.00  |
| English Language in the Workplace                                       | KFAT               | £28,000.00  | £14,000.00  |
| Developing Open Learning Materials and Enhancing Learners' Skills       | Way Ahead Training | £38,000.00  | £12,000.00  |

8.15 Further development is needed to support unions to develop strategies for continuation of successful activities, including the development of bidding expertise and understanding of the range of other funding opportunities available to support workplace learning activities.

### **Increased partnership working**

#### Sector Partners

8.16 ULF partnerships have involved unions working with sector based organisations included trade associations and National Training Organisations (NTOs). Overall ULF projects have worked with eight NTOs: Community Justice, Distributive NTO, Further Education NTO, Higher Education, Metier-Arts and Entertainment, Skillset-Broadcast media, the Rail Industry and the Steel Industry NTOs. The work with NTOs has included:

- **the integration of national occupational standards into learning programmes;**

- **the development of contacts with employers working at a strategic level within a sector;**
- **giving feeding back on NTO frameworks and the uptake of NVQs;**
- **giving access to expertise on training and learning pathways.**

8.17 The remit of sector based organisations does not always match that covered by a union, and in many cases relationships and communication between these organisations and many unions are not strong. However, the experience of unions working with sector bodies has generally been very favourable with mutual benefits being realised by both parties.

## 9 TRADE UNION VALUE ADDED

*"The partnership with the Union has been a real success, we (the college) have tried to run basic skills previously without any significant take-up. The learning representatives have played a vital role in 'selling' the course to learners and supporting them through it."*

### **KEY POINTS**

- *ULF activities have been successful in engaging non-traditional learners and the unique contribution of unions in promoting lifelong learning amongst the workforce relates to the strength of relationship that reps and officers have with individuals and potential learners.*
- *Work on identifying learners needs and bringing together groups of learners with similar needs puts unions in a strong position to negotiate with providers.*
- *A number of ULF projects are impacting upon employers attitude and strategies towards learning.*
- *Unions can contribute to the debate on workforce and sector skill needs and on approaches to addressing these needs through the research and intelligence gathered.*
- *There is a need for unions to be able to demonstrate more clearly, through more systematic monitoring and evaluation, the added value of their activities.*
- *It is evident that where ULF projects have been least successful, activities have been focused on areas where unions have relatively less expertise.*

### **Relationship to potential learners**

- 9.1 The unique contribution of unions to lifelong learning amongst the workforce relates to the strength of relationship that reps and officers have with individuals at work, including those with limited skills and experience of learning. Union based learning projects are able to support individuals through building confidence, supporting learners as they progress and advising learner's on possible next steps.
- 9.2 Despite the success in raising demand for learning, and often way beyond initial expectations, some projects highlight that those in most need of accessing learning or with the least confidence to do so, may not yet have come forward. Unions have the ability to develop approaches to access the 'hardest to reach' group.

## Influencing employers

- 9.3 A number of ULF projects are also impacting upon employers attitude and strategies towards learning. In some cases unions are leading employers in understanding of the purpose and value of supporting learning across the whole organisation.
- 9.4 Unions are also engaging employers in social partnership to work to address both skill needs that underpin business competitiveness and the skills development needed by individuals to enhance their longer term employability.
- 9.5 Many union led project activities face barriers because of the lack of support from employers in terms of time off for learning, access to training resources and support from line managers. More focus needs to be given by unions to working with employers at a strategic as well as operational level.

## Intelligence on Skills needs

- 9.6 Unions also have the ability to raise the level of debate and awareness of sector skill issues and the learning needs of groups in the workforce that have traditionally been excluded from consultation exercises and needs analyses. This intelligence can be used to:
- **encourage employers to consider the longer term benefits of workforce learning rather than the short term costs;**
  - **help individual employers benchmark to make them aware of the ways in which others and competitors are addressing workforce skills needs;**
  - **make funding and policy making agencies (TECs, LSCs, SBSs, RDAs etc) aware of skills needs issues.**
- 9.7 A key example of this has been the learning needs assessments undertaken by ULF projects and quantifying the extent of basic skills needs.
- 9.8 Stronger mechanisms need to be developed by unions and policy making agencies to ensure that this intelligence is gathered and added to the existing body of knowledge on skills needs.

## Collective strength - negotiating with providers

- 9.9 For individual learners, unions have been able to negotiate with providers to make learning content and delivery of courses more tailored to learners needs and to reduce the costs of learning by negotiating fee reductions and accessing ILAs.

The **GPMU Reach** project demonstrates the advantages of the union's collective strength. The project's ability to attract large numbers of learners and its good relationship with a variety of local employers has given it substantial bargaining power with local providers. The upshot of this success has been that ULF money has not been spent on paying for the training resulting from project activities, any training has been funded through college sources, European money or similar. This has meant that the project team has had the time and resources to work on the more strategic aspects of the project such as developing links with employers, other potential funders and providers.

## 10 KEY SUCCESS FACTORS

10.1 "We have had a high level of commitment from some employers and many union reps are building relationships with external organisations - such as universities and community groups."

### **KEY POINTS**

- ***The critical success factors of effective ULF projects are in:***
  - ***Project management;***
  - ***Project design;***
  - ***Project integration.***

10.2 'Success' is defined both as a project delivering its stated objectives and in making progress to ensure that activities are sustainable and the critical success factors relate to project management, project design and project integration.

### **Project management:**

10.3 A key success factor in ULF Round 2 has been the improvement in project management. As one project manager noted:

**"(the) project management course was very helpful, helped get the project on track. I wish that this could have been delivered before the project started. Key learning from the course was the need for preparation and planning before work starts."**

10.4 Key success factors in project management are:

- **setting and monitoring progress towards the achievement of realistic targets;**
- **ensuring the union has control of the project, even though providers or employers might be delivering the many of project activities;**
- **support and supervision of new staff by more experienced project managers;**
- **the early agreement of the roles and responsibilities of all parties;**

- **on-going communication of the benefits and achievements of project outcomes with employers, senior union officers and others;**
- **review and evaluation to identify, plan and gain support for the continuation of successful activities.**

## **Project design**

10.5 There has been a broad range of project activities and there is no single type of project that can be assessed as being more effective than any other. Part of the strength of the ULF is the flexibility it allows for projects to be tailored to meet the specific needs of unions and workplaces. There are however a number of features in project design that help to ensure success:

- learner needs are researched and these shape the content and design of provision;
- early involvement of employers, working for example with regional organisers, TUC regional structures or TECs to gain commitment from employers, especially to help secure release for learners or learning representatives;
- project design and delivery is flexible to meet learners needs;
- work on engaging learners is union-led (in some ULF projects this has been employer-led or provider-led and in most cases have been less successful in engaging non-traditional learners, especially those with basic skills needs);
- commitment to the project is gained by each party contributing something (employer, union, learner);
- (although resource intensive), projects that have included the training and support for learning mentors have been particularly effective at ensuring learners complete courses and progress to other learning.



## Project Integration

- 10.6 Project activities taking place in isolation have been unlikely to continue. Successful projects are projects which have succeeded meeting their 'in project targets' and those where learning activities are more likely to continue are integrated with one or more of the following:
- employer learning strategies;
  - union learning strategies;
  - 'mainstream' post-16 initiatives and funding.
- 10.7 Evidence of integration is also seen by those projects working in partnership to lever in additional funding to help sustain activities. Leverage might be from external sources or from within the union itself.
- 10.8 Section 2 reported that the overall amount of funding levered in across all ULF Round 2 projects had not increased from Round 1. But where Round 2 projects had been successful in leveraging in funding, the average amount of leverage was over £43,000, almost matching the initial funding support from the ULF.
- 10.9 Section 8 reported on the projects that had been most successful in Round 2 in securing additional funding. These projects, with one exception, met or exceeded all their initial project targets, in some cases the demand for learning created was way in excess of that initially planned. These projects also had strong partnership arrangements and project management approaches to enable project delivery to be well planned but responsive to learners needs.
- 10.10 The projects that have been most successful in leveraging in additional funds are listed in **Table 10.1** include those that have developed learning centres, those that have developed qualifications and those that have delivered workplace learning programmes. There is no one type of project that has been more successful in leveraging in additional funding and achieving sustainable outcomes. But it is important to note that projects that have secured sustainable outcomes through the leverage of additional funding have one or more of the above features of integration.

10.11 **Table 10.1** gives an overview of the ways in which these projects are linked into other learning initiatives, the source of funding levered in and the ways in which projects will be sustained. Projects are integrated into one or more of the following:

- employer learning programmes (e.g. TUC NW, UNIFI, UNISON, NUJ);
- other 'mainstream' workplace learning initiatives (e.g. AEEU, PCS, GPMU);
- partnership with key sector players (e.g. MU, KFAT).

10.12 The extent to which the projects identified in Table 10.1 are integrated into other local, regional or sectoral learning initiatives has helped ensure that the individual project activities can be sustained in the longer term (through funding and partner commitment) and form part of the union's longer term strategy for developing learning services for members.

Table 10.1: Examples of Integrated Projects - Key Features

| Project Title                                  | Union  | Leverage | Features   |
|--|--------|----------|--|
| Developing a Trade Union Employability Service | TUC NW | £138,000 | <b>Project:</b> Developed a model to work with employers and learning representatives to assess and develop key skills<br><b>Leverage:</b> Regional Development Agencies Skills Development Fund.<br><b>Integration:</b> Employer learning strategies, regional skills objectives<br><b>Sustainability:</b> developing a framework with the potential for on-going projects with employers and TECs/LSCs<br><b>Other:</b> Drew together a practitioners groups helping to develop FE/providers awareness of workplace delivery |
| PCS Key Skills Learning Centre                 | PCS    | £92,000  | <b>Project:</b> To develop a key skills/ICT learning centre working in partnership with key sector employers<br><b>Leverage:</b> Employers and the Union<br><b>Integration:</b> Developing links with Ufi, strategic partnership with Government Departments as key employers, led to employers encouraging participation and releasing staff.<br><b>Sustainability:</b> Continuation through partnership arrangements between the union, employers and FE. Will extend provision to cover basic skills                        |
| The Learning Champions of Derbyshire           | AEEU   | £63,000  | <b>Project:</b> Developing a framework of learner support/learning champions<br><b>Leverage:</b> Employers<br><b>Integration:</b> Place within employer IIP strategies, linked to mentoring for New Deal/MAs<br><b>Sustainability:</b> Employer commitment, new AEEU learning project co-ordinator will transfer the model elsewhere   |
| Maestro Project                                | MU     | £63,000  | <b>Project:</b> To develop a new award with on-line materials to help reps support members, use union learning services and gain accreditation<br><b>Leverage:</b> ESF/Adapt<br><b>Integration:</b> Working in partnership with the NTO<br><b>Sustainability:</b> Developing learning resources as part of the unions' learning services for members   |
| The Learning Zone                              | GPMU   | £46,000  | <b>Project:</b> Developing a learning centre at the branch offering a range of learning services, information advice and guidance, emergency support responding to redundancy, learning representatives training (TDLB)<br><b>Leverage:</b> ESF Objective 4, employers,<br><b>Integration:</b> Working jointly with employers e.g. to bid for continuation<br><b>Sustainability:</b> Dti Partnership funding, ERDF funding   |

**Table 10.1: Examples of Integrated Projects - Key Features**

| Project Title  | Union  | Leverage | Features  |
|--|--------|----------|---|
| Developing Accessible Workplace Learning Centres in the Public Services* | UNISON | £43,920  | <b>Project:</b> Developing models of workplace learning centres with Birmingham City Council targeting non-traditional learners and the community<br><b>Leverage:</b> Employer<br><b>Integration:</b> Led to a formal employer partnership agreement on lifelong learning<br><b>Sustainability:</b> Employer commitment   |
| Internal Development Project – UNIFI *                                   | UNIFI  | £41,000  | <b>Project:</b> Internal development programme<br><b>Leverage:</b> Employer<br><b>Integration:</b> Linked directly to addressing key areas of internal skills shortage<br><b>Sustainability:</b> Employer commitment, evaluation of the significant net savings of internal recruitment   |
| Editorial Computer Skills Training Programme                             | NUJ    | £35,000  | <b>Project:</b> Delivery of higher level computer skills training for journalists<br><b>Leverage:</b> Employers<br><b>Integration:</b> Development of a service meeting employees and freelancers skill needs within the industry<br><b>Sustainability:</b> Developing joint approach with other entertainment unions, extending provision to meet identified demand, new union post created to help co-ordinate and sustain activities |
| English Language in the Workplace*                                       | KFAT   | £14,000  | <b>Project:</b> Development of basic communication skills<br><b>Leverage:</b> Employers<br><b>Integration:</b> Close partnership working with provider and trade association<br><b>Sustainability:</b> Employer and partner commitment. Pilot project has demonstrated business benefits to employers   |

## 11 OVERVIEW AND CONCLUSIONS

### Overview

- 11.1 Round 1 provided opportunities for many unions to 'prepare the ground' for delivering learning services and Round 2 has been successful supporting an expansion in the range and volume of activity. There has been a shift of emphasis, with projects developing a wider range of activities and more likely to incorporate a learning 'package' which includes, for example, training learning representatives, learners participating in courses and accessing funding for learning through ILAs.
- 11.2 The key feature of ULF projects is that the learning activity is mainly learner-led with learning needs analyses being used to develop learning content and determine the time and place of delivery of learning. There is a wider range of unions participating and activities taking place across a wider range of regions.
- 11.3 There are increasing signs that union strategy for learning is developing, with over one third of projects having a national focus and some structures of staffing and support being developed to help sustain activities.
- 11.4 Project performance has improved, but there is still considerable scope for improved planning and management of projects to ensure delivery to target and prepare for continuation. Projects are still concentrated in regions where Bargaining for Skills also have strong teams.
- 11.5 There is evidence of planning for sustainability but many projects rely on continued support from the ULF and there are still limited direct linkages with other 'mainstream' funded workforce development initiatives other than with ILAs. There has been an increase in the range of funding sources accessed to help sustain activities but overall the level of funding levered in from other sources has not increased.
- 11.6 Successful projects (projects that succeed in achieving their targets and in sustaining activities) are more likely to address a 'package' of learning activities, but projects need to be wary of setting unrealistic targets which they know they are unlikely to achieve. This is not a successful strategy in gaining credibility with key partners.

11.7 Recruiting basic skills learners has been harder than expected, and highlights that the needs of this group and methods of encouragement and support are qualitatively different from those used to encourage other 'returners' to learning. Although projects have encountered these difficulties, they have achieved greater success in reaching this target group than many providers and employers that have previously tried to reach this group. In this context, ULF basic skills pilot projects have demonstrated the benefits of a union-led approach and of working in partnership with providers and employers to reach this group.

## **Conclusions**

11.8 There are a number of key success factors that have been identified. New projects should seek to build in these features and be assessed against them. However, certain 'risky' projects will need to be supported to ensure that union-led projects continue to innovate.

11.9 Issues of capacity, sustainability and integration continue to be an issue and these need to be addressed to ensure that the momentum that has been gained is not lost and that the expectations of those in the workforce that have been brought into learning are not disappointed.

11.10 There is collective experience of running over 100 projects by 49 unions, the TUC and the BfS teams. Although the regular TUC-led seminars have been very effective in sharing experience and ideas, there is further scope to improve the dissemination and sharing of good practice on both the delivery of projects and sustaining activities to ensure that performance improves and planning for sustainability is more systematically built into projects.

11.11 The key value added that trade unions bring is both the ability to encourage non-traditional learners into learning and to ensure that programmes are driven by learner needs. This helps to redress the imbalance in the learning market which can often be characterised as 'provider-led' due to current funding systems.

- 11.12 The development of learning representatives is a cornerstone of union learning activities. The actual number of learning representatives trained has been below that expected in Round 2 and overall. The constraints faced by learning representatives in terms of recognition by employers and, in some instances, working in relative isolation from other structures in the union needs to be addressed to ensure that the number of learning representatives can be increased and their activities sustained.
- 11.13 There are over 6,500 'ULF' learners that have completed courses but little is known in total about their characteristics, the impact on them of these activities and the extent to which their learning activities are sustained. Project level monitoring and evaluation needs to continue to be strengthened to ensure that this gives a clearer picture of project achievements and outcomes and a stronger basis for making decisions about the continuation and further development of union learning activities.

## 12 IMPLICATIONS AND RECOMMENDATIONS

*"The Union Learning Fund has been invaluable in helping unions to get moving and trying different approaches but we must not become too reliant on it, it would be a disaster if all the momentum gained was suddenly lost if ULF stops. We need to be thinking about that much more."*

### KEY POINTS

- *The integration of ULF activities and further capacity building need to be addressed to ensure that the benefits of union learning are sustained.*
- *There is still scope to bring more unions into that activity and spread good practice on the ground. However, there is also now a need to ensure that union learning develops at a more strategic level with both unions and employers.*
- *The DfEE needs to ensure that there are effective linkages between related policy areas. For example, in the development of workforce development plans and Investors in People.*
- *The criteria for ULF bids should place stronger emphasis on the need for unions to develop projects within a strategic context.*
- *Whilst recognising the competitive pressures facing some unions, further encouragement should be given to the development of cost effective joint solutions.*
- *There is continued need for training and support on project management training and for this to include advice on bid writing and planning for sustainability and continuation. The DfEE should also consider supporting bids which specifically seek to develop union capacity through the training and development and sharing of good practice between unions.*

### Policy and Strategy

- 12.1 Learning representatives and models of work-based learner support are key to the success of many ULF projects. A constraint on the achievement of many projects links to the lack of support from employers, particularly in terms of paid release for study or access to learning resources at work. At the national level, the DfEE has the capacity to work with its agencies to **promote the value of lifelong learning to employers** and make the case to employers for supporting workforce development activities.



- 12.2 Furthermore, ULF projects should include an element which seeks to **engage the union in dialogue with employers at a strategic level** to promote the value of learning to the organisation.
- 12.3 The DfEE needs to consider the integration of union-led ULF learner support programmes with other programmes that it supports and to exploit opportunities of **linkages with other policy developments** including:
- **TEC/LSC workforce development plans;**
  - **NTO sector workforce development plans;**
  - **ILA national framework.**
- 12.4 ULF projects have promoted some joint working between unions and between individual unions and the TUC, there is scope to further encourage joint working to share resources and reduce the overall cost to individual unions of sustaining further development. Whilst recognising the competitive pressure facing some unions, further encouragement should be given to the **development of cost effective joint solutions** which help to sustain union learning activities. This might include the development of local or regional networks to share information on learning opportunities, share experience of working with local providers and an extension of the work to share good practice between unions.
- 12.5 Using the bidding process and ULF prospectus, **stronger emphasis** needs to be placed by the DfEE on the requirement for unions to be developing **ULF projects within the context of a medium or longer term vision** for learning. Bids need to include evidence of a strategic commitment to developing learning services and the planning of activities which seek to embed and sustain learning activities. This may include approaches at one or all of the following levels:
- **at national/regional/sectoral strategy for learning;**
  - **at a strategic level, working with employers to develop learning agreements;**
  - **at an operational level with employers and providers to raise awareness and deliver or facilitate access to learning for individuals.**
- 12.6 The distribution of projects continues to be concentrated in areas where BfS team are relatively strong. DfEE may wish to see **bids from areas where activity is under-represented**, for example by encouraging bids from unions with established projects seeking to replicate projects activity in areas where activity is low.
-

- 12.7 To ensure that union-led workforce development happens more evenly across the country, there is also a need to ensure that linkages between the BfS teams and unions working in 'under-represented' regions are strengthened to ensure that ULF activities develop more evenly across the regions, especially in the (RDA) regions which have identified the need to address basic skills needs in their Regional Skills Action Plan.

### Dissemination

- 12.8 Considerable dissemination activity has taken place between ULF projects. There is now scope for Unions, working with the TUC and DfEE, to ensure that the value added contribution made to workplace learning can be clearly demonstrated and **disseminated to employers, employer fora and other post-16 learning agencies**. We recommend that networking and dissemination events are continued to be supported by the ULF and that these widen their audience to include key partners.
- 12.9 The methods of '**recruitment**' to **basic skills courses that have been explored provide a range of good practice 'tips' and models**. This good practice needs to be disseminated widely both to unions, providers and others seeking to address basic skills as the good practice developed has wider applicability and messages and implications for providers and how they work with unions and others to reach this client group.

### Training and Support

- 12.10 The training and support offered to ULF projects from TUC Learning Services and Bargaining for Skills teams has been very well received. There is continued demand for training and support on project management training and for this to be **enhanced to include advice on bid writing and planning for sustainability** and continuation. We recommend that DfEE and the TUC produce guidance for unions in this area.

- 12.11 Many project managers felt that some aspects of the training would have been helpful prior to the bidding taking place, helping unions to consider more carefully their project proposals, make objectives more realistic through learning from others experience and undertaking initial research in advance of seeking funding from ULF. 'Pre-bid' support has been available for 'new' basic skills projects. **The DfEE needs to consider options for supporting projects that specifically seek to address capacity building issues such as project management development and sharing good practice, or to look for elements of capacity building, such as supervision of new staff or staff training within the project outline.**
- 12.12 Bargaining for Skills teams have been involved in supporting almost all of ULF projects and worked with a number of specialist unions that have not traditionally worked with the TUC, to bid to ULF. The impact of the support given to projects by BfS teams has been to improve the quality of the design and delivery of projects in many cases. Long-term support for BfS is, however, unclear. The on-going success of ULF will partly be determined by the ability of BfS to continue to give this support. DfEE, therefore, needs to continue to work with the TUC to assess the potential for strengthening and augmenting BfS teams in the region.

### Evaluation

- 12.13 There is a need for unions to be able to demonstrate more clearly, through more systematic monitoring and evaluation, the added value of their activities. Particularly, the extent to which the ULF projects are reaching non-traditional learners, the profile of these learners and the progress made by them.
- 12.14 The extent and quality of project evaluation remains patchy. Many evaluations have been undertaken 'in-house', although externally commissioned work has not necessarily resulted in useful evaluation being delivered. There is a need to strengthen evaluation methodologies to include more structured research with participants and stakeholders.
- 12.15 Monitoring and evaluation need to be improved to underpin improvements in project management and as a tool to help promote the work of ULF activities and outcomes. Messages used in dissemination activities needs to be based on good quality monitoring and evaluation to ensure credibility. **The good practice tips and lessons learned should be made widely available to ULF projects through reviewing and developing the Ulf project managers 'handbook'.**

- 12.16 At the national level, the ULF evaluation has focused on detailing more systematically the activities and outcomes from ULF projects. The **national evaluation project now needs to extend the range of evaluation activities to focus more systematically on setting baselines measuring the impact of ULF on learners, unions and employers.** The volume of projects and participants and the availability of more systematic data on project profiles and achievements will enable a structured sample to be developed.
- 12.17 We recommend that the DfEE commissions a survey of ULF learners and employer organisations involved in ULF activities to better understand their characteristics and the impacts achieved.



**ANNEX A:**  
**ULF PROJECTS**  
**ROUNDS 1 & 2**

| Round 1 Projects      |   |               |           |                  |                             |                |
|-----------------------|---|---------------|-----------|------------------|-----------------------------|----------------|
| Union                 | Project Title   | ULF Reference | ULF Round | Original Project | Project Manager             | YCL Contact    |
| AEEU                  | Young People Project  | ULF 07/98     | 1         |                  | John Lloyd                  | James Brass    |
| AEEU                  | Accelerate Access to Learning in Humberside                                       | ULF 32/98     | 1, 2      |                  | Ron Oldfield                | James Brass    |
| AEEU                  | Learning Excellence Together  | ULF 34/98     | 1         |                  | Dick Croft                  | James Brass    |
| BECTU                 | Training and Career Guidance and the Advice Scheme (Skillsbase)                   | ULF 51/98     | 1, 2      |                  | Trisha Boland               | Georgina Cowen |
| BFAWU                 | Building Capacity to Support Membership and Staff Development in Food Sector      | ULF 14/98     | 1, 2      |                  | Ronnie Draper               | Georgina Cowen |
| GMB                   | Pathways to Learning  | ULF 28/98     | 1         |                  | Shirley Palmer              | Georgina Cowen |
| GMB                   | Adults in to Learning with the GMB  | ULF 49/98     | 1         |                  | Kevin Rowan                 | Jo Cutter      |
| GMB                   | Union Capacity Building to Maximise Learning Opportunities through Supplier Chain | ULF 09/98     | 1         |                  | Ken Lowe                    | Georgina Cowen |
| GMB                   | Learning Links  | ULF 21/98     | 1, 2      |                  | Ann McLachlan               | Georgina Cowen |
| GMB                   | Achieving the Learning Agenda   | ULF 29/98     | 1         |                  | Jake Jackson                | Georgina Cowen |
| GPMU                  | Promoting the Training and Development Charter                                    | ULF 24/98     | 1         |                  | Joe McCarty                 | James Brass    |
| GPMU                  | Making Available High Quality Information, Advice and Support - using Ufl         | ULF 26/98     | 1, 2      |                  | Bernard Rutter              | James Brass    |
| ISTC                  | Rapid Response to Redundancy  | ULF 22/98     | 1, 2      |                  | Tony Myhill                 | James Brass    |
| ISTC                  | Capacity Building in South Yorkshire  | ULF 20/98     | 1         |                  | Tony Myhill                 | James Brass    |
| ITF                   | Learning in Captive Time in the Transport Sector                                  | ULF 16/98     | 1         |                  | Joanne Abayasekara          | Jo Cutter      |
| KFAT                  | Information Technology Project  | ULF 11/98     | 1         |                  | Paul Keenan                 | James Brass    |
| Learning Through Life | Planning to Learn   | ULF 37/98     | 1         |                  | David McEvoy                | Michael Dodd   |
| MSF                   | Promoting NVQs in the Financial Services Sector                                   | ULF 08/98     | 1, 2      |                  | Gordon Noble / Sarah Howard | Georgina Cowen |
| MSF                   | Establishment of Virtual Learning Centre  | ULF 06/98     | 1, 2      |                  | Dr Sarah Howard             | Georgina Cowen |
| MSF                   | Support Employee Development in the Voluntary Sector on Merseyside                | ULF 44/98     | 1         |                  | Brian Khader                | Georgina Cowen |
| MU                    | Developing Open and Flexible Learning Materials                                   | ULF 35/98     | 1         |                  | Sue Borland                 | Michael Dodd   |
| NAPO                  | Development of the Certificate in Community Justice                               | ULF 27/98     | 1, 2      |                  | Rita Nicholson              | Georgina Cowen |
| NUJ                   | Editorial Computer Skills Training Project  | ULF 23/98     | 1, 2      |                  | Jeremy Dear                 | James Brass    |
| SOR                   | Continuing Professional Development and Lifelong Learning                         | ULF 30/98     | 1         |                  | Gill Nelson                 | James Brass    |
| TGWU                  | The Learning Centre   | ULF 10/98     | 1         |                  | John Fearn                  | James Brass    |
| TGWU                  | Developing a Portable IT Resource   | ULF 36/98     | 1         |                  | Bob Sissons                 | James Brass    |

| Round 1 Projects (Cont.) |  |               |           |                  |                 |                |
|--------------------------|--|---------------|-----------|------------------|-----------------|----------------|
| Union                    | Project Title  | ULF Reference | ULF Round | Original Project | Project Manager | YCL Contact    |
| TGWU                     | Training Needs in the Road Transport Sector  | ULF 33/98     | 1, 2      |                  | Ann McCall      | James Brass    |
| TGWU                     | Transferable Skills for Work Based Learning by Telematic Delivery                                | ULF 31/98     | 1, 2      |                  | Mick Bond       | James Brass    |
| TUC NW                   | Building Union Capacity in Individual Learning Accounts  | ULF 42/98     | 1         |                  | Dave Eva        | Georgina Cowen |
| TUC London               | Union Learning Representatives - A Sectoral Development Plan                                     | ULF 25/98     | 1         |                  | Ms Phil Gowan   | Georgina Cowen |
| TUC N                    | Union Capacity to Support Ufl  | ULF 41/98     | 1, 2      |                  | Anne Hansen     | Georgina Cowen |
| TUC SW                   | Breaking the Learning Barriers for Part-time Workers   | ULF 19/98     | 1         |                  | Nigel Costley   | Roger Turner   |
| UCATT                    | Raising Awareness - Qualifications   | ULF 13/98     | 1, 2      |                  | Robert Cathcart | Michael Dodd   |
| UNIFI                    | Partners in Education  | ULF 12/98     | 1         |                  | Pauline Ortiz   | Jo Cutter      |
| UNIFI                    | Building Partnerships in Lifelong Learning   | ULF 15/98     | 1         |                  | Pauline Ortiz   | Jo Cutter      |
| UNIFI                    | Extending the Learning Centre at FDR   | ULF 45/98     | 1         |                  | Pauline Ortiz   | Jo Cutter      |
| Unions in EDAP           | Growth through Learning  | ULF 18/98     | 1, 2      |                  | Mick Hadgraft   | Jo Cutter      |
| UNISON                   | Support for Lifelong Learning  | ULF 17/98     | 1         |                  | Tony Chandler   | Michael Dodd   |
| UNISON                   | Building UNISON's Lifelong Learning Capacity   | ULF 39/98     | 1         |                  | Tony Chandler   | Michael Dodd   |
| UNISON                   | Creating Lifelong Learning Advisers  | ULF 40/98     | 1, 2      |                  | Tony Chandler   | Michael Dodd   |
| UNISON                   | Learning in Health and Social Welfare  | ULF 38/98     | 1         |                  | Steve Williams  | Michael Dodd   |
| USDAW                    | Promoting an Understanding of Dyslexia as an Obstacle to Access and Learning within Trade Unions | ULF 47/98     | 1         |                  | James Rees      | Georgina Cowen |
| USDAW                    | Promoting the use of Manchester City Centre Learning Centre                                      | ULF 48/98     | 1, 2      |                  | James Rees      | Georgina Cowen |
| USDAW                    | Promoting Lifelong Learning in the home shopping sector  | ULF 46/98     | 1, 2      |                  | James Rees      | Georgina Cowen |



| Round 2 and Continuation Projects |  |               |           |                  |                 |                |
|-----------------------------------|--|---------------|-----------|------------------|-----------------|----------------|
| Union                             | Project Title  | ULF Reference | ULF Round | Original Project | Project Manager | YCL Contact    |
| AEEU                              | The Learning Champions of Derbyshire   | ULF 02/99     | 2         |                  | Andy Sims       | James Brass    |
| AEEU                              | Flexible Learning, Supervisory and Teamwork Skills                               | ULF 03/99     | 2         |                  | Andy Sims       | James Brass    |
| AEEU                              | Development of Advice and Guidance Using Learner Reps                            | ULF 04/99     | 2         |                  | Andy Sims       | James Brass    |
| AEEU                              | The Beacon Centre  | ULF 05/99     | 1, 2      | ULF 32/98        | Andy Sims       | James Brass    |
| ALAE                              | Advice and Guidance for Continued Professional Development of Aircraft Engineers | ULF 67/99     | 2         |                  | John Sawyer     | Jo Cutter      |
| ASLEF                             | Developing Trade Union Learning Representatives in the Rail Industry             | ULF 06/99     | 2         |                  | Bob Towers      | Roger Turner   |
| BECTU                             | Skillsbase   | ULF 50/99     | 1, 2      | ULF 51/98        | Ilka Walkley    | Georgina Cowen |
| BFAWU                             | Basic Food Skills in the Baking Industry   | ULF 08/99     | 2         |                  | Paddy Hill      | Georgina Cowen |
| BFAWU                             | Distance Learning Support Project  | ULF 07/99     | 1, 2      | ULF 14/98        | Ronnie Draper   | Georgina Cowen |
| CATU                              | Pathway to Lifelong Learning   | ULF 11/99     | 2         |                  | John Lally      | Roger Turner   |
| CWU                               | Access to Training for the Profoundly Deaf                                       | ULF 12/99     | 2         |                  | Jenny Ainsley   | Michael Dodd   |
| CWU                               | Partners in Resource Analysis and Reskilling                                     | ULF 13/99     | 2         |                  | Dave Ward       | Michael Dodd   |
| CYWU                              | Part Time Youth Workers In Service Training Project                              | ULF 14/99     | 2         |                  | Doug Nicholls   | Michael Dodd   |
| Equity                            | Job Information Service (JIS)  | ULF 54/99     | 2         |                  | Louise Grainger | Jo Cutter      |
| GFTU                              | A Pilot On-line Course for Basic Communication Skills                            | ULF 51/99     | 2         |                  | Andrew Harvey   | Michael Dodd   |
| GMB                               | Employee Skills Development Awareness in the Process of Change                   | ULF 19/99     | 2         |                  | Rene Barrett    | Georgina Cowen |
| GMB                               | Springboard  | ULF 20/99     | 2         |                  | Jake Jackson    | Georgina Cowen |
| GMB                               | Connect up to Learning   | ULF 56/99     | 2         |                  | Jenny Webber    | Jo Cutter      |
| GMB                               | Learning Links at St. Helens   | ULF 21/99     | 1, 2      | ULF 21/98        | Ann McLachlan   | Georgina Cowen |
| GMB                               | Communication Skills in the Workplace  | ULF 57/99     | 2         |                  | Kevin Rowan     | Jo Cutter      |
| GPMU                              | Basic Skills Project   | ULF 63/99     | 2         |                  | Joe McCarty     | James Brass    |
| GPMU                              | Managing Technological Change by Retraining and Upskilling                       | ULF 16/99     | 2         |                  | Louisa Bull     | James Brass    |
| GPMU                              | The Learning Zone  | ULF 17/99     | 1, 2      | ULF 26/98        | Bernard Rutter  | James Brass    |
| GPMU                              | REACH  | ULF 18/99     | 2         |                  | Steven Attwill  | James Brass    |
| IFMA                              | Certificate in Football Management & Administration                              | ULF 53/99     | 2         |                  | Kevin Verity    | Roger Turner   |
| IPMS                              | To Encourage Black and Asian Specialist Engineers Towards Greater Employability  | ULF 25/99     | 2         |                  | Wendi Harrison  | Jo Cutter      |
| ISTC                              | Lifelong Learning Support Network  | ULF 23/99     | 2         |                  | Tony Myhill     | James Brass    |
| ISTC                              | Rapid Response to Redundancy   | ULF 24/99     | 1, 2      | ULF 22/98        | Tony Myhill     | James Brass    |
| ISTC                              | Basic Skills Support Network   | ULF 58/99     | 2         |                  | Tony Myhill     | James Brass    |

| Round 2 and Continuation Projects (Cont.) |   |               |           |                  |                  |                |
|---|---|---------------|-----------|------------------|------------------|----------------|
| Union                                     | Project Title   | ULF Reference | ULF Round | Original Project | Project Manager  | YCL Contact    |
| KFAT                                      | English Language in the Workplace   | ULF 59/99     | 2         |                  | Jack Firth       | James Brass    |
| MSF                                       | A Skills Development Programme for Higher Technical Staff in the North of England | ULF 65/99     | 2         |                  | Debbie Greenwood | Jo Cutter      |
| MSF                                       | Promoting NVQs Through Learning Representatives                                   | ULF 28/99     | 1, 2      | ULF 08/98        | Dr Sarah Howard  | Georgina Cowen |
| MSF                                       | Whitehall Online  | ULF 27/99     | 1, 2      | ULF 06/98        | Dr Sarah Howard  | Georgina Cowen |
| MSF                                       | Implementing Employee Development Programmes in Merseyside's Voluntary Sector     | ULF 68/99     | 2         | ULF 44/98        | Brian Khader     | Georgina Cowan |
| MU  | Maestro Project   | ULF 26/99     | 2         |                  | Bob Wearn        | Michael Dodd   |
| NAPO                                      | NAPO Certificate in Community Justice and Accessible Routes                       | ULF 30/99     | 1, 2      | ULF 27/98        | Rita Nicholson   | Georgina Cowen |
| NATFHE                                    | New Opportunities for Part-time Lecturers to meet Teaching Standards              | ULF 29/99     | 2         |                  | Dan Taubman      | Jo Cutter      |
| NUJ                                       | Editorial Computer Skills Training Programme                                      | ULF 31/99     | 1, 2      | ULF 23/98        | Jeremy Dear      | James Brass    |
| NUT                                       | ICT Skills for Teachers   | ULF 52/99     | 2         |                  | Arthur Jarman    | Roger Turner   |
| PCS                                       | PCS Key Skills Learning Centre  | ULF 32/99     | 2         |                  | Jim McAuslan     | James Brass    |
| RCM                                       | Promoting Lifelong Learning through information management and technology         | ULF 33/99     | 2         |                  | Rosaline Steele  | Michael Dodd   |
| RCN                                       | Development of a Professional Facilitator Network for Nurses                      | ULF 34/99     | 2         |                  | Greta Thornbory  | Michael Dodd   |
| SCP                                       | Virtual Training Centre   | ULF 35/99     | 2         |                  | Joanna Brown     | James Brass    |
| TGWU                                      | Developing ICT Skills for Stagecoach Passenger Transport Union Representatives    | ULF 37/99     | 2         |                  | Dr John Fisher   | James Brass    |
| TGWU                                      | Transferable Skills for Workbased Learners by Telematic Delivery                  | ULF 38/99     | 1, 2      | ULF 31/98        | Mick Bond        | James Brass    |
| TGWU                                      | Skills Challenge for the Road Haulage Industry                                    | ULF 36/99     | 1, 2      | ULF 33/99        | Ann McCall       | James Brass    |
| TGWU                                      | Preparation for Key Skills For Security Staff At Heathrow Airport                 | ULF 64/99     | 2         |                  | Ray Carrell      | James Brass    |
| TUC NW                                    | Basic Skills: Developing the Trade Union Role                                     | ULF 62/99     | 2         |                  | Dave Eva         | Jo Cutter      |
| TUC London                                | Learning Support for the Role in Ufl  | ULF 39/99     | 1, 2      | ULF 41/98        | Phil Gowan       | Georgina Cowen |
| TUC NW                                    | Developing a Trade Union Employability Service                                    | ULF 41/99     | 2         |                  | Dave Eva         | Georgina Cowen |
| TUC SW                                    | Gateway for Learning for Union Members  | ULF 40/99     | 2         |                  | Ken Pearson      | Roger Turner   |
| UCATT                                     | Building Learning   | ULF 48/99     | 1, 2      | ULF 13/98        | J Hopewell       | Michael Dodd   |
| UNIFI                                     | Internal Development Project - UNIFI and Coventry Building Society                | ULF 10/99     | 2         |                  | Pauline Ortiz    | Jo Cutter      |
| Unions in EDAP                            | Learning Representatives/Individual Pathways                                      | ULF 15/99     | 1, 2      | ULF 18/98        | Mick Hadgraft    | Jo Cutter      |

| Round 2 and Continuation Projects (Cont.) |   |               |           |                  |                    |                        |
|---|---|---------------|-----------|------------------|--------------------|------------------------|
| Union                                     | Project Title   | ULF Reference | ULF Round | Original Project | Project Manager    | YCL Contact            |
| UNISON                                    | UNISON/Gardener Merchant Healthcare Basic Skills Project                | ULF 60/99     | 2         |                  | Steve Williams     | Michael Dodd/Jo Cutter |
| UNISON                                    | Credit Union Learning with UNISON and the WEA                           | ULF 43/99     | 2         |                  | Helen Titherington | Michael Dodd           |
| UNISON                                    | Lifelong Learning Online  | ULF 42/99     | 1, 2      | ULF 40/98        | Tony Chandler      | Michael Dodd           |
| UNISON                                    | Developing Accessible Workplace Learning Centres in the Public Services | ULF 44/99     | 2         |                  | Steve Williams     | Michael Dodd           |
| USDAW                                     | An Usdaw Project to Promote ILAs and the Ufl on Humberside              | ULF 45/99     | 2         |                  | James Rees         | Jo Cutter              |
| USDAW                                     | Basic Skills in the Home Shopping Sector                                | ULF 61/99     | 2         |                  | James Rees         | Georgina Cowen         |
| USDAW                                     | A Partnership to Promote Lifelong Learning in Empire Stores...          | ULF 46/99     | 1, 2      | ULF 46/98        | James Rees         | Georgina Cowen         |
| USDAW                                     | Developing a City Centre Learning Centre to Promote ILAs and the Ufl    | ULF 47/99     | 1, 2      | ULF 48/98        | James Rees         | Georgina Cowen         |
| WayAhead Training                         | Developing Open Learning Materials and Enhancing Learners' Skills       | ULF 49/99     | 2         |                  | Celia Pillay       | Roger Turner           |

**ANNEX B:**

**ULF PROJECT  
PROJECT ACHIEVEMENTS**

**Table 1:  
ULF Funds by Union in Round 1 & 2**

| <b>Union</b>          | <b>Round 1</b> |    | <b>Round 2</b> |    | <b>Total</b> |     |
|-----------------------|----------------|----|----------------|----|--------------|-----|
| AEEU                  | £124,500       | 3  | £167,065       | 4  | £ 291,565    | 7   |
| ALAE                  | £ -            | 0  | £18,660        | 1  | £18,660      | 1   |
| ASLEF                 | £ -            | 0  | £50,000        | 1  | £50,000      | 1   |
| BECTU                 | £ 44,000       | 1  | £40,000        | 1  | £84,000      | 2   |
| BFAWU                 | £ 49,055       | 1  | £69,950        | 2  | £119,005     | 3   |
| CATU                  | £ -            | 0  | £43,482        | 1  | £43,482      | 1   |
| CWU                   | £ -            | 0  | £90,000        | 2  | £90,000      | 2   |
| CYWU                  | £ -            | 0  | £47,950        | 1  | £ 47,950     | 1   |
| Equity                | £ -            | 0  | £32,369        | 1  | £ 32,369     | 1   |
| GFTU                  | £ -            | 0  | £36,370        | 1  | £ 36,370     | 1   |
| GMB                   | £148,349       | 5  | £187,210       | 5  | £ 335,559    | 10  |
| GPMU                  | £ 97,500       | 2  | £158,000       | 4  | £ 255,500    | 6   |
| IFMA                  | £ -            | 0  | £33,195        | 1  | £ 33,195     | 1   |
| IPMS                  | £ -            | 0  | £19,090        | 1  | £ 19,090     | 1   |
| ISTC                  | £ 60,000       | 2  | £97,250        | 3  | £ 157,250    | 5   |
| ITF                   | £ 46,710       | 1  | £ -            | 0  | £ 46,710     | 1   |
| KFAT                  | £ 19,900       | 1  | £28,000        | 1  | £ 47,900     | 2   |
| Learning Through Life | £ 50,000       | 1  | £ -            | 0  | £ 50,000     | 1   |
| MSF                   | £136,135       | 3  | £162,094       | 4  | £ 298,229    | 7   |
| MU                    | £ 50,000       | 1  | £52,000        | 1  | £ 102,000    | 2   |
| NAPO                  | £ 31,382       | 1  | £50,000        | 1  | £ 81,382     | 2   |
| NATFHE                | £ -            | 0  | £48,680        | 1  | £ 48,680     | 1   |
| NUJ                   | £ 50,000       | 1  | £57,000        | 1  | £ 107,000    | 2   |
| NUT                   | £ -            | 0  | £34,200        | 1  | £ 34,200     | 1   |
| PCS                   | £ -            | 0  | £50,000        | 1  | £ 50,000     | 1   |
| RCM                   | £ -            | 0  | £50,000        | 1  | £ 50,000     | 1   |
| RCN                   | £ -            | 0  | £49,366        | 1  | £ 49,366     | 1   |
| SCP                   | £ -            | 0  | £42,000        | 1  | £ 42,000     | 1   |
| SOR                   | £ 22,000       | 1  | £ -            | 0  | £ 22,000     | 1   |
| TGWU                  | £161,390       | 4  | £143,080       | 4  | £ 304,470    | 8   |
| TUC                   | £ -            | 1  | £256,494       | 1  | 256,494      | 2   |
| TUC London            | £40,000        | 1  | £47,000        | 1  | £87,000      | 2   |
| TUC North             | £46,350        | 1  | £ -            | 0  | £46,350      | 1   |
| TUC North West        | £49,800        | 1  | £71,940        | 2  | £121,740     | 3   |
| TUC South West        | £42,000        | 1  | £49,770        | 1  | £91,770      | 1   |
| UCATT                 | £ 50,000       | 1  | £52,000        | 1  | £ 102,000    | 2   |
| UNIFI                 | £ 73,400       | 3  | £19,000        | 2  | £ 92,400     | 5   |
| Unions in EDAP        | £ 50,000       | 1  | £39,940        | 1  | £ 89,940     | 2   |
| UNISON                | £169,700       | 4  | £138,165       | 4  | £ 307,865    | 8   |
| USDAW                 | £ 80,000       | 3  | £94,450        | 3  | £ 174,450    | 6   |
| WayAhead Training     | £ -            | 0  | £38,000        | 1  | £ 38,000     | 1   |
| <b>Total</b>          | £1,692,171     | 45 | £2,663,770     | 64 | £4,355,941   | 109 |

| <b>Table 2:<br/>Other Sources of Funding for ULF Projects</b> |                 |     |                 |     |                     |     |
|---|-----------------|-----|-----------------|-----|---------------------|-----|
| <b>Source</b>   | <b>Round 1</b>  |     | <b>New</b>      |     | <b>Continuation</b> |     |
| Partners (inc. employer)                                      | £148,260        | 33% | £222,420        | 48% | £41,640             | 44% |
| TEC   | £135,700        | 30% | -               | -   | -                   | -   |
| ADAPT   | £104,508        | 23% | £63,000         | 13% | £26,000             | 27% |
| ESF (non-adapt)   | £40,847         | 9%  | -               | -   | -                   | -   |
| SDF   | -               | -   | £115,000        | 25% | -                   | -   |
| Other   | £24,036         | 5%  | £66,500         | 14% | £27,000             | 29% |
| <b>Total reported 'leverage'</b>                              | <b>£453,351</b> |     | <b>£466,920</b> |     | <b>£94,640</b>      |     |

| <b>Table 3a:<br/>Outputs from Round 1 Projects</b> |                      |               |               |
|--|----------------------|---------------|---------------|
| <b>Outputs</b>                                     | <b>N<sup>1</sup></b> | <b>Target</b> | <b>Actual</b> |
| Number of learners                                 | 17                   | 968           | 2172          |
| Number attending awareness sessions                | 19                   | 3940          | 5728          |
| Number of learning reps trained                    | 18                   | 693           | 734           |
| Number achieving qualifications                    | 13                   | 148           | 603           |
| Number of accredited courses developed             | 8                    | 11            | 12            |
| Number of other materials developed                | 14                   | 22            | 51            |
| Number of employers directly involved              | 20                   | 489           | 633           |
| Number of learning centers established             | 8                    | 6             | 11            |
| Number of ILAs taken-up                            | 2                    | 600           | 488           |
| Number of training needs analyses                  | 8                    | 930           | 2243          |

| <b>Table 3b:<br/>Outputs from Round 2b Projects</b> |                      |               |               |
|---|----------------------|---------------|---------------|
| <b>Output</b>                                       | <b>N<sup>1</sup></b> | <b>Target</b> | <b>Actual</b> |
| Number of learners                                  | 38                   | 4350          | 4460          |
| Number attending awareness sessions                 | 11                   | 3833          | 7725          |
| Number of learning reps trained                     | 29                   | 937           | 882           |
| Number of achieving qualifications                  | 18                   | 643           | 834           |
| Number of accredited courses developed              | 14                   | 23            | 79            |
| Number of 'other' materials developed               | 18                   | 41            | 44            |
| Number of employers involved                        | 21                   | 234           | 549           |
| Number of learning centers established              | 10                   | 15            | 15            |
| Number of ILAs taken-up                             | 18                   | 1525          | 2404          |
| Number of members TNA                               | 8                    | 1000          | 1523          |

<sup>1</sup> Number of projects seeking to achieve outputs under this heading. Total Number of projects in Round 1=45, Round 2=64, Total ULF projects =109.

**Table 3c:**  
**Outputs from All ULF Projects**

| <b>Outputs</b>                         | <b>% target<br/>ach'd</b> | <b>Target</b> | <b>Actual</b> |
|--|---------------------------|---------------|---------------|
| Number of learners                     | 125%                      | 5318          | 6632          |
| Number attending awareness sessions    | 173%                      | 7773          | 13453         |
| Number of learning reps trained        | 99%                       | 1630          | 1616          |
| Number of achieving qualifications     | 182%                      | 791           | 1437          |
| Number of courses developed/accessed   | 268%                      | 34            | 91            |
| Number of other materials developed    | 151%                      | 63            | 95            |
| Number of employers directly involved  | 163%                      | 723           | 1182          |
| Number of learning centers established | 124%                      | 21            | 26            |
| Number of ILAs taken-up                | 136%                      | 2125          | 2892          |
| Number of training needs analyses      | 195%                      | 1930          | 3766          |





**TABLE 4**  
**ROUND 1 PROJECTS THAT DID NOT SEEK ULF ROUND 2 FUNDING**

| <b>ULF Ref</b> | <b>Union</b> | <b>Project Title</b>   | <b>Continuation of activities</b>   |
|----------------|--------------|--|---|
| ULF 07/98      | AEEU         | Young People Project   | This project is a pilot for a wider national scheme. This actual project has not continued, due to the funding issues facing the for local education authorities. However similar activities are taking place in other areas taking on board the lessons learned from the project.  |
| ULF 09/98      | GMB          | Maximise Learning Opportunities through Supplier Chain       | The training in advice/guidance and mentoring has resulted in several union stewards being equipped to provide advice/guidance on an ongoing basis. Four of these are also equipped to coach and train new stewards on how to provide advice/guidance as they join the company.   |
| ULF 10/98      | TGWU         | The Learning Centre  | The centre is established, the volume targets for the projects have been exceeded, and links with employers and colleges are being strengthened all the time. Learning activity continues.  |
| ULF 11/98      | KFAT         | Information Technology Project                               | The project is not continuing. The union felt that the bureaucracy and the time involved in running the project was too much of a strain on the organisation. They may bid again if ULF runs in to a third year.  |
| ULF 12/98      | UNIFI        | Partners in Education  | The interest from the employer has been high and most aspects of the project could be sustained with modification of existing budgets. The project is looking at Individual Learning Accounts programme as a way of enhancing the funding available to support the project.   |
| ULF 15/98      | UNIFI        | Building Partnerships in Lifelong Learning                   | Uni of East London has a substantial ESF package (£150K) to underpin teaching and development resources, employers committed. Three further colleges in the new target areas have been confirmed (Wirral Met, Park Lane College Leeds, Solihull College Birmingham). BIFU will need to continue to commit funds to ensure the union 'ownership' of the scheme and to build capacity |
| ULF 16/98      | ITF          | Learning in Captive Time in the Transport Sector             | Project faced difficulties and slippage on timescales and not completed. Initially it was a one year project but the project required longer set-up development time.   |
| ULF 17/98      | UNISON       | Support for Lifelong Learning                                | TUC will take on the system as part of TUC Ufl project.   |
| ULF 19/98      | TUC SW       | Breaking the Learning Barriers for Part-time Workers         | Bargaining For Skills has continued to use the materials and act on lessons learnt. Company contacts have been maintained. Partnership has ceased to meet formally but the network remains.   |
| ULF 20/98      | ISTC         | Capacity Building in South Yorkshire                         | The project is part of an overall strategy being carried out by the ISTC aimed at creating a 'Union for Life' culture. Training and development are very much part of their agenda. While the project has not continued in its present guise it has allowed the identification of a number of areas which a further application could focus upon.                                   |
| ULF 24/98      | GPMU         | Promoting the Training and Development Charter               | N/A   |
| ULF 25/98      | TUC London   | Union Learning Representatives - A Sectoral Development Plan | Learning representatives need to become well established to sustain activity and training of learning representatives needs to continue. Possible options for funding the training of learning representatives have been considered, including individual learning accounts.  |
| ULF 28/98      | GMB          | Pathways to Learning   | The project has been resource intensive for the project manager who has spent a great deal of time negotiating and talking with employers and training providers. The most effective way to sustain the project activities will be through developing training representatives to undertake the work that the project manager has undertaken.                                       |

**TABLE 4 (Cont.)**  
**ROUND 1 PROJECTS THAT DID NOT SEEK ULF ROUND 2 FUNDING**

| <b>ULF Ref</b> | <b>Union</b>          | <b>Project Title</b>                                      | <b>Continuation of activities</b>  |
|----------------|-----------------------|---|--|
| ULF 29/98      | GMB                   | Achieving the Learning Agenda                             | In order to sustain the project over its initial seven month life and beyond, GMB sought funding from other sources. They have been successful in gaining funding from: the European Social Fund Objective 4 programme (£17,872) from April 1999 to December 1999 (secured via Lincolnshire TEC); and funding from Lincolnshire TEC (£4,500), G Notts. TEC (£4,500), North Nottinghamshire TEC (£2,000), Humberside TEC (£2,000), & Leicestershire TEC (£900).                             |
| ULF 30/98      | SOR                   | Continuing Professional Development and Lifelong Learning | As a result of the project SOR are appointing a national CPD officer, developing policy and opportunities for training etc. Promotional work has encouraged take up of ILAs with Local TECs. National TU Ed committee looking at developing separate 'learning rep' status.  |
| ULF 34/98      | AEEU                  | Learning Excellence Together                              | Courses ended in November 1999 however there are long lasting outputs such as the Learning Centre and the materials within it. There are also plans to look in to bidding for more funding through ULF in the future for other projects in the locus of the plant.   |
| ULF 35/98      | MU                    | Developing Open and Flexible Learning Materials           | Field trailing and dissemination of the learning materials will take place through continued support from Metier and a successful matching ESF bid. Project is now on-line and being used by our members although funding has stopped.   |
| ULF 36/98      | TGWU                  | Developing a Portable IT Resource                         | Continued to provide IT training for union members across the region. There is ongoing promotion through in house communication meetings, regular e-mail updates and notice boards and work heavily to promote via an open day to local companies. Currently establishing structure for measurement against National Standards (CLAIT, Key Skills, NVQ IT level 1, 2 and 3) partly funded by the union and South Birmingham College during 1999. Future funding possible in 2000 with ESF. |
| ULF 37/98      | Learning Through Life | Planning to Learn   | Project activities not continuing. Impact difficult to evaluate at this stage since the project is focused on awareness and motivation.  |
| ULF 38/98      | UNISON                | Learning in Health and Social Welfare                     | Programme will run to 2001, expansion/replicability possible but at an early stage, 4 new cohorts planned to start Autumn 2000   |
| ULF 39/98      | UNISON                | Building UNISON's Lifelong Learning Capacity              | N/A  |
| ULF 42/98      | TUC                   | Building Union Capacity in Individual Learning Accounts   | High profile promotion and dissemination events have raised ILAs and lifelong learning agenda with Trade Unions and partners. Project activities have continued through support from DfEE/TUC ILA project, 20+ ULF round 2 projects have ILA strand, BFS working with NWTECS to promote ILA's through unions, TUC/UFI adapt project, Learning rep development is ongoing.  |
| ULF 45/98      | UNIFI                 | Extending the Learning Centre at FDR                      | Difficult due to uneasiness of employer. Essex TEC have committed continuing support in the form of ILAs.  |
| ULF 47/98      | USDAW                 | Promoting Understanding of                                | Materials completed and distributed and used by learning reps  |
| ULF 49/98      | GMB                   | Adults in to Learning with the GMB                        | Employer withdrew support  |

