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## AN EARLY EVALUATION OF THE UNION LEARNING FUND

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### Background

Announced in 'The Learning Age' Consultation Paper in 1998, the Union Learning Fund (ULF) aims to promote union activity to support the creation of the learning society, and is concerned with the acquisition and retention of key skills at appropriate levels in the union movement to achieve this.

The Fund had £2 million in 1998, subsequently increased to £6 million in the current Parliament. Approximately £1.8 million was awarded in ULF Round One between 45 projects, run by 21 union organisations.

The 1998 themes were: advice, guidance and support; equality and access; integration of learning in company business plans; and accredited training for young workers. 1998 projects focused on four main areas: awareness raising; learning centres; provision of 'ready made' learning packages; and development and testing of new learning provision.

Target participants include general union members, union activists, young and excluded workers, families and communities.

### Conclusions

- Round One of the ULF has been a success. Some ULF projects have exceeded expectations. For example, nearly three times the number of union officials than originally planned received training to be a Learning Representative (1,000 officials).
- However, a few projects have experienced difficulties in achieving their objectives in time, especially where the unions have limited experience managing learning activities or managing projects.
- Some unions at the start of the projects lacked knowledge of the learning environment and this confirmed the immediate need to develop the function of the Union Learning Representative, which was a feature of many Round One projects.
- The evaluation has shown that unions have and can contribute to lifelong learning. For the individual, value added is shown by the demand for training that would otherwise not have been accessible. Projects are building capacity that will in turn stimulate "bottom up" demand.

and with freelancers or with  
-vocational learning (both

career development and leisure activity)  
that the employer would not see as directly

beneficial show that ULF is adding value. In others the dividing line is more difficult, and the extent of continued union activity compared with employer responsibility, capacity to pay and philosophical stance must be considered. This has proven especially true of SMEs.

- Employers have reported increased interest and take-up of opportunities, including through the trust developed in learning representatives. Employees and employers have regarded the offer of learning support as positive service from the union.
- Some practical achievements of the ULF to date include:
  - 6 new qualifications
  - 20 learning centres have been developed or enhanced
  - over 2,000 people have received training
  - 6 ULF projects have links with Individual Learning Accounts and
  - 9 links with University for Industry
  - nearly £500,000 has been levered in by ULF projects (including £170,000 from employers and nearly £285,000 from European Union funds).
- Most projects had a local focus in the first year; the capacity of the individual unions to transfer activities or replicate good practice will largely develop in future years.
- Key to sustainability of learning initiatives is the commitment of union leaders, staff and representatives, reinforced through links to strategic plans and the policies of key partners.

## Methodology

Between December 1998 and March 1999 a formative evaluation of early progress was carried out to identify emerging good practice in Round One projects.

The evaluation was conducted in three stages:

- Compilation of an interim 'performance matrix', indicating objectives, processes and expected outcomes;

- 14 projects were visited to draw out experiences and activities in depth;
- Compilation of a final 'progress checklist' to identify quantitative achievements and to encourage description of process issues that had arisen.

## Themes

### *Project management*

- Projects led by those with previous project management and learning experience have had fewer difficulties in achieving their objectives in the time available.
- Issues included unions' experience in managing learning activities and setting unrealistic objectives and time-scales for projects.
- There were many cases where outcomes were affected by the late appointment of a project worker and where unions appointed staff with little experience of project management or of the training and learning environment. Often, project workers were recruited on fixed short-term contracts or placements, or externally appointed consultants ran projects.
- Whilst this is a pragmatic way to achieve short-term project goals, unions risk losing much of the opportunity to embed newly acquired skills and knowledge. Provision of training will assist this, and criteria can be built into the bidding process to ensure adequate planning for these aspects of delivery in future.

### *Planning*

- Real, identified need has proven particularly important in terms of implementing project objectives and ensuring continuity and sustainability.
- Levels of bidding expertise were lacking, and this was reflected during the contract period with issues relating to scheduling of project activity having a knock-on effect on later stages and lack of 'market research' leading to underestimates of demand.

- Where more detailed planning had been undertaken the projects appear to have been less prone to variations in activities and outputs.

#### *Innovation*

- Some union activists are sceptical about the value of learning as part of the union 'package', while others see the development of learning as presenting an opportunity similar to the development of the health and safety representative.
- Many projects are contributing to the development of current initiatives in the fields of occupational standards, qualifications, use of training technologies, ICT and so on. These projects are highly innovative in their context: the union sector.
- There has been innovation in *process* through development of effective relationships, resolving academic issues and getting employers involved; in *product* development adding to the range of choice of workers; in *content* through modifying existing practice and developing new practice to address the needs of new audiences.

#### *Partnership Working*

- Partnerships observed include employers, FE and HE institutions, NTOs, TEC/CCTEs training providers and other unions.
- Partnership issues reported were:
  - Establishing clarity of interest, needs and expectations;
  - Clear assignment of roles;
  - Understanding the working environment of the HE/FE/TEC sectors;
  - Ensuring clarity of contract, especially where replication of training is intended.

#### *Links with other learning initiatives*

- The 'Collective Learning Fund' model developed by unions for Individual Learning Accounts could be significant in embedding ILAs in the workplace.
- Several projects are aiming to contribute to the University for Industry, providing services through initiatives with their sector NTOs.

### **Policy Implications/future Fund development**

#### *Policy and Strategy*

- Early emphasis on encouragement should develop to require clarity of focus in unions' medium to long term objectives. ULF should encourage a more strategic approach from unions, to ensure that projects focus on embedding the experience and capacity developed and increase the likelihood of continuity of learning support.
- There should be opportunities for spread of good practice through linkage of projects by aims, sector and regional focus.
- Policy and assessment criteria should gradually be tightened. There should be more emphasis on strategic aspects such as overall union objectives for learning, setting and meeting realistic objectives, defining the 'business planning' aspects and on planning for long term sustainability.
- ULF should accept 'in principle' bids for larger projects, run over more than one Round, or which deal with multi-union partnerships. There should be increased requirement to show the resources and contributions of partners in these projects.
- ULF managers should be clear in the strategic use of the Fund: is it as a co-funder of a union's learning strategy, as a primary source of development funds, or as a funder of 'last resort' when other sources have been exhausted?

#### *Training and Support*

- The seminar and workshop programme introduced during Round One should be enhanced to focus on bidding and planning, project management and evaluation issues.

Stronger emphasis should be placed on sustainability and continuation.

- The recently introduced 'Induction Pack' should help unions to be better prepared for their projects.

#### *Evaluation*

- Some unions are using external evaluation only for the 'learning' aspects of the project rather than to review 'process' aspects. Others have only appointed their evaluators at a late stage with the result that evaluation design is retrospective.
- ULF investment in training in evaluation and dissemination of evaluation findings is adding to union capacity through developing skills and strategic capability.
- To continue this supportive approach to evaluation, future national evaluation strategy should be both formative and summative, encouraging a long term focus on development and continuation of learning activity.

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