



An Evaluation of the UK Union Learning Fund - its Impact on Unions and Employers

Final Report, June 2005

VP/2003/012 {REF /EMPL/F/4/ARC(2004)D/14341}

Hannah Wood and Sian Moore

Working Lives Research Institute

London Metropolitan University

Acknowledgements

We would like to thank all those who responded to the surveys and spared time to be interviewed for the research. We are grateful to members of the project steering committee for their significant input into the project: Geof Luton, Amicus Unifi; Mike Kidd, Amicus Unifi; Alan Roe, Amicus; David Tarren Amicus GPM; Trish Lavelle, CWU; Patrick Styles, CWU; Kenny Barron, TGWU; Bert Clough, TUC; James Rees, Usdaw and Cilla Ross, University of Leeds.

This research was funded by the European Commission Employment and Social Affairs DG, Employment and ESF Policy Coordination Employment Strategy.

The Working Lives Research Institute

The Working Lives Research Institute (WLRI) is a new centre for research and teaching based at the London Metropolitan University. The institute undertakes socially committed academic and applied research into all aspects of working lives, emphasising equality and social justice, and working for and in partnership with trade unions.

www.workinglives.org

Contents

Introduction.....	4
Section 1: Background.....	4
Section 2: Project Activities.....	5
Section 3: Research Methods.....	7
Section 4: Findings.....	10
Section 5: Summary.....	37
Section 5: Conclusions.....	40
References	42

Annexes

Annex 1: Project Steering Committee Minutes

Annex 2: Conference Report

An Evaluation of the UK Union Learning Fund – its Impact on Unions and Employers

Introduction

This report presents the activities and findings of the Working Lives Research Institute (WLRI) research project evaluating the UK Union Learning Fund (ULF) and its impact on trade unions and employers. Section 1 briefly outlines the background to the project and the aims and objectives of the research. Section 2 sets out the activities undertaken during the course of the project. Section 3 describes the research methods. Section 4 outlines the main findings, and Section 5 presents a summary. Finally, Section 6 draws some conclusions.

Section 1: Background

Over £50 million of UK government funds has been invested in union learning through the ULF. The ULF was set up in England in May 1998 with the aim of providing government funding for trade union projects that promote workplace learning. Similar funds were subsequently established by the devolved administrations in Wales, Scotland, and Northern Ireland. The ULF is monitored annually by the Department for Education and Skills (DfES) (Antill *et al*, 2001; Cutter *et al*, 2000; Shaw, 1999; Shaw *et al*, 2002). This monitoring has focused primarily on what can be described as hard quantitative outcomes, for example the ability of unions to achieve predefined ‘outputs’ or targets. Whilst this information is important, it tells us little about the internal dynamics of trade union learning or the real impact of the ULF on unions, employers and employees at workplace level. This project, therefore, aimed to gather information and evidence about some of the ‘softer’ outcomes of the ULF. The central research questions fall under the following headings:

- The role and experiences of union learning representatives (ULRs);
- The impact of the ULF on trade union agendas and organisation;
- The impact of the ULF on employment relations in the workplace – unionisation and partnership.

Section 2: Project Activities

2.1 Project management

A steering committee, made up of WLRI researchers, representatives from five trade unions (Amicus, CWU, GPMU, TGWU, and Unifi) and the TUC, met regularly throughout the project and oversaw each stage of the research¹. Dr Cilla Ross, senior teaching fellow in Adult Continuing Education at the University of Leeds, was also a member of the steering committee. The steering committee was actively involved in each stage of the research and their expertise informed the development of the research instruments. Their commitment was key to the success of the Conference and a positive aspect of the project. Copies of steering committee minutes can be found at Annex 1.

2.2 Data collection²

There were three stages of data collection. The first stage, the national union officer survey, was based on semi-structured telephone interviews with trade union officers. Respondents were union officers with national responsibilities for education, training and lifelong learning. The aim was to capture data on union learning strategies, policies and practices at national level, and to explore the links between union learning and organising and collective bargaining agendas.

The second stage of the research was a national postal survey of ULRs in the five participating unions. This focused on the experiences and characteristics of ULRs; the integration of ULRs into union structures and organisation; relationships with employers and the impact of learning agreements.

Finally, a number of workplace case studies focused on union learning projects and activities in seven different workplaces. These produced qualitative data covering a range of union learning activities, experiences and outcomes. The aim was to provide in-depth information about the

¹ During the project, the GPMU and Unifi merged with Amicus to form one union. The project steering committee expanded to include representatives from USDAW (shop workers/retail union) and PCS (civil service union).

² The project included two national surveys. In this document the national union officer survey will be referred to as the national union survey. The ULR survey will be referred to as the ULR survey.

experiences of ULRs and employers, particularly the links between union learning and collective bargaining at workplace level.

2.3 Dissemination

Initial findings from the national union and ULR surveys were presented and discussed at the project conference held in London in November 2004. The audience included more than 100 actors and stakeholders in union learning, including ULRs, full-time trade union officers and project workers, representatives from the Learning and Skills Council (LSC) and Department for Education and Skills, and academics. The conference was organised around the project's main themes: the ULR role, links with collective bargaining and organising, and partnership and employer involvement.

A conference report (Annex 2), including contributions from speakers and participants, was sent to all delegates in February 2005 and was published on the WLRI website. The project steering committee's involvement in all stages of the research helped to ensure that the project was both informed by and fed back to trade unions and that the research findings were widely communicated.

The findings of the research are currently being fed into discussions between the TUC and the UK government on possible future statutory support for union learning in the workplace.

Section 3: Methodology

3.1 The National union survey

Telephone interviews with national officers were carried out between March and September 2004. These were based upon a semi-structured interview schedule and lasted on average 40 minutes. Of the 38 unions contacted, 26 participated in the survey (a response rate of 68 per cent). Participating unions ranged from the UK's largest union, Unison, to smaller, specialised unions such as the CYWU (Community and Youth Workers Union). In most cases, respondents were National Education Officers whose role combines traditional activist and membership education with strategic responsibility for ULF work. However, six respondents worked in roles dedicated to lifelong learning/ULF project management. All interviews were tape recorded and transcribed.

In addition a self-completion questionnaire was sent to forty-six trade unions and independent staff associations that had not yet received any ULF funding. This explored the reasons why some unions have not participated in the ULF, and gathered information about union learning activity taking place independently from it. In response 21 questionnaires were returned (from 20 unions³), a response rate of 43 per cent.

3.2 The ULR survey

The survey of ULRs was based upon a self-completion questionnaire, developed in conjunction with the steering committee and piloted with 10 ULRs. Following revisions, questionnaires were posted to all ULRs in the five participating unions during August and September 2004. In most cases mailings were organised by the unions themselves. Most unions held national records of ULRs, but in one case (TGWU) there was no central list so the mailing was organised on a regional basis.

It became clear during the research that the ULR population is fluid and that even unions that have established national ULR lists are

³A few weeks after the surveys were posted to unions, reminders were sent to those unions that had yet to respond. Subsequently one union submitted two separate responses; one from the Assistant General Secretary, and one from the Education Officer.

experiencing problems tracking ULRs. It is therefore difficult to know the actual (as opposed to potential) population for the survey, but it is possibly around 2400. In total 353 questionnaires were returned (giving a notional response rate of 15 per cent).

In addition to the 353 completed questionnaires, 80 were returned as undeliverable because the addresses were wrong or incomplete, or the addressee had gone away. There were also a number of responses from non-active ULRs (because they were on long term sick leave, had changed jobs or been made redundant), and a small number of people contacted the research team to say that they were not and never had been ULRs.

Table 1 provides a distribution of responses by the unions involved in the survey, along with the number of ULRs each union was thought to have and to whom questionnaires were sent. A response rate per union is provided; there is wide variation between unions, but given the uncertainty over the figures for ULRs these should be treated with caution. Despite the high response rate from finance union, Unifi, the survey is dominated by the two larger manufacturing unions, Amicus and the TGWU.

<i>Union</i>	<i>Responses Number (%)</i>	<i>Number of ULRs (responses as % of ULRs)</i>
Amicus	180 (51.0)	889 (20.2)
CWU	41 (11.6)	350 (11.7)
GPMU	37 (10.5)	300 (12.3)
TGWU	71 (20.1)	884 (8.0)
Unifi	24 (6.8)	50 (4.8)
Total	353(100)	2473 (14.3)

The low and varied response illustrates the challenges unions are experiencing in terms of collecting and maintaining ULR records. In some cases, unions had difficulties distinguishing between trained and active ULRs and those who may have attended briefing sessions (and had therefore been included in mailing lists) but had not actually taken up the role. The relatively high number of undeliverable questionnaires and the number of responses from non-active ULRs raise questions about what happens to ULRs over a period of time. Is the ‘turnover’ of ULRs unusually high compared to other types of activist, and if so, why?

The disadvantages of postal surveys as a method of data collection are well documented. There was some concern that there may be additional

issues specific to researching trade unions that should be taken into account, such as the time that ULRs would have available to complete and return the survey, and the requirement for literacy skills in terms of determining who responded and how. It was hoped, however, that such issues might be overcome, or at least identified, through the involvement of union staff. The majority of responses came from long-standing activists, many of whom combine ULR responsibilities with other union duties. This raises questions about whether our sample is representative of ULRs in the unions surveyed, or how far the data collection method may have discouraged responses from new activists.

3.3 Workplace case studies

The workplace case studies involved face to face interviews with ULRs and managers with responsibility for union learning. In some cases it was also possible to interview employees/union learners and trade union or TUC learning project workers. The case studies were based upon semi-structured interview schedules and focused on seven workplaces in four different occupational sectors: finance, manufacturing, the print sector and food manufacture. Case selection was purposive and based upon suggestions from the project steering committee. The trade unions represented in the case studies included Amicus, GPMU, Unifi, TGWU, KFAT and USDAW. Access was negotiated initially through the project steering committee and later through ULRs and union or TUC project workers. The interviews took place between January and May 2005 and lasted on average around 60 minutes. They were taped and transcribed.

Section 4: Findings

This section presents the main research findings and is structured around the project's three central themes:

1. The role and experiences of ULRs;
2. The impact of the ULF on union agendas and organisation;
3. The impact of the ULF on bargaining and industrial relations in the workplace – unionisation and partnership.

4.1 The ULR Role

This section focuses on the profile, characteristics and motivations of ULRs. Research questions consider the extent to which ULRs are new to union activism, *how* they come to be involved in union learning, and the extent to which the experiences, motivations and values of new activists are distinct from those of existing activists.

Who are ULRs?

The majority (77 per cent) of respondents to the ULR survey were male, under a quarter (23 per cent) were female. This proportion of women ULRs is lower than in other recent ULR surveys (York Consulting, 2003:3) and may in part reflect the sectors covered by the unions involved, which were largely manufacturing, communications and transport (comparable surveys have included public sector unions). In the case of Unifi, which covers the finance sector, over half the respondents were female.

A relatively low proportion (five per cent) of ULRs described their ethnic background as black or minority ethnic. This is slightly below that recorded in another recent ULR survey, where minority ethnic groups accounted for six per cent of ULRs compared to less than two per cent in a similar survey carried out in 2000 (York Consulting, 2003:3).

The average age of respondents was 43, fewer than one in ten (nine per cent) ULRs were under 35. Most respondents were also long standing union members, with 68 per cent in membership for ten years or more. Only a very small proportion were recent members. Just six per cent had

been in membership for less than three years and the average membership was 19 years.

The survey revealed that ULRs are largely made up of existing union activists: over three-quarters (78 per cent) held another position in the union or had done so in the past. However, nearly a quarter (22 per cent) of respondents were 'new activists', i.e. they did not or had not held another position in the union and the characteristics of this new activist group were distinctive. They were more likely to be women (39 per cent compared to 19 per cent of existing activists); more likely to be black or minority ethnic (7 per cent compared to 4 per cent); and were younger (18 per cent are under 35 compared to 6 per cent of existing activists). This reinforces the TUC claim that union learning is attracting a new group of activists to the union movement. However, these 'new activists' are not necessarily new union members. One ULR, who had been in the role for 4 months, described his experience of union membership as follows:

'I've always been in the union but... a bit distant from it. The only time (members) ever really have any participation with the union is if we've got something like a wage negotiation... Getting involved with the union is quite interesting work...but it's a bit daunting' (New ULR, aerospace).

Union membership

The ULR survey included questions on ULR attitudes to union activity and membership (Table 2). Around a third appear to be politically committed: 38 per cent described their activity as an extension of their political beliefs. Just under another third were union activists with no overt political commitment: 30 per cent said 'I am active but not interested in the political aspects of the union'. New activists were more likely than existing activists to describe themselves as 'active on learning but not involved in other aspects of the union' (64 per cent) and were far less likely to be motivated by political commitment – under one in ten (six per cent) were compared to just under half (47 per cent) of the existing activist group.

Table 2: Which of the following most closely represents your attitude now towards your union?	
	Number (%)
I am not currently active in the union	18 (5.1)
I am active on learning but don't get involved in other aspects of the union	88 (24.9)
I am active but not interested in the political aspects of the union	104 (29.5)
I am active and see the union as an extension of my political beliefs	134 (38.0)
Missing	9 (2.0)
Total	353 (100)

The most popular reasons for joining the union in the first place were to get better pay and conditions (70 per cent) and a belief in trade unionism (68 per cent) (Table 3). One third of ULRs (33 per cent) cited access to training/education and the same proportion to secure equal opportunities at work. New activists were far less likely than existing activists to have joined because of a belief in trade unionism (38 per cent compared to 76 per cent) or to help get better pay and conditions (52 per cent compared to 74 per cent).

Table 3: Why did you join?	
	Number (%)
To help get better pay and conditions	244 (69.1)
A belief in trade unionism	238 (67.4)
As insurance should a problem arise at work	182 (51.5)
Experience of unfair management	128 (36.2)
Access to training and education	117 (33.1)
To secure equal opportunities at work	117 (33.1)
Member services such as legal advice	94 (26.6)
Most people at work are members	75 (21.2)
Family influence	38 (10.8)
The union's public campaigning	17 (4.8)
Union financial services	12 (3.4)
As a result of a recruitment/organising drive	4 (1.1)
Other	18 (5.1)
Total	*353 (100)

*Respondents could choose up to five

Becoming a ULR

The ULR survey suggests that very few ULRs are elected to the role. More than half (58 per cent) of respondents had volunteered for the role and more than one third (34 per cent) had been ‘asked/nominated or appointed’ (Table 2). Just four per cent had been elected.

	Number (%)
I was asked/nominated/ appointed	121 (34.3)
I volunteered	204 (57.8)
I was elected	13 (3.7)
Other	8 (2.3)
Missing	7 (2.0)
Total	353 (100)

The survey also suggests that the main motivating factor for becoming a ULR is a commitment to education within the context of union activity (Table 5). Around a third (30 per cent) were motivated by the opportunity for ‘personal development’ but only ten per cent cited ‘career development’ suggesting that for ULRs at least union learning is not just about employability.

	Number (%)
I was asked by a union officer	93 (26.3)
I was a union learner and wanted to encourage others	41 (11.6)
I was not involved in the union but was interested in education	51 (14.4)
I was involved in the union and thought education was important	180 (50.1)
I was asked by management	16 (4.5)
Personal Development	107 (30.3)
Career Development	36 (10.1)
I wanted to get more involved in the union	56 (15.8)
Other	28 (7.9)
Missing	11 (3.1)
Total	*353 (100)

* Respondents could choose up to three statements

This was mirrored in the workplace case studies where all ULRs interviewed had either volunteered for the role or had been asked or persuaded by union colleagues or a full-time officer. In most cases, ULRs were motivated by a general interest or commitment to education, which often reflected their own positive experiences of learning:

'I left school without any qualifications and I've always been interested, since I got made redundant, in improving my qualifications. Since gaining the skills myself, I started to take an interest in making sure that other people got those opportunities. Certainly (my employer) has been very good at supporting me in getting other qualifications, but I could see that opportunities weren't been applied equally across the company. Other people were getting more support than I was and some others were getting a lot less. So as a union rep I decided that somebody ought to be doing something about it. At the end of the day, that became me' (ULR and workplace rep, aerospace).

'I found that after I'd done my apprenticeship I wanted to go back and do other courses. I went back and did an ONC and HNC in mechanical engineering. Now I thought a lot of people out there are older and they want to get into learning...I thought it would be a nice challenge to help someone gain a qualification or become able to use a computer, or anything really. I was quite eager to help people out' (ULR, aerospace manufacturing).

In other cases, ULRs had been union learners themselves, or had come to the role through trade union education:

'Truthfully...we didn't have a clue what it (lifelong learning) was about. We saw this (ULR) course (but) we didn't really know what it was about. We thought we'd go on it' (ULR and shop steward, manufacturing).

The appointment/election of ULRs

The national union survey indicates that unions that have received ULF support are more likely to have developed policies on learning beyond traditional union education for full-time officers and lay representatives. However, few unions have established formal policies. Of the 25 unions that had received ULF funds ten said that the union had a policy on lifelong learning. The status of such policies ranged from formal conference policies and NEC motions to 'strategic plans', 'statements' and union publications and reports.

Over two thirds of union officers (68 per cent) said the union was taking a flexible approach to the election and appointment of ULRs, a factor

which was also clearly reflected in the ULR survey and workplace case studies.

'It's totally driven by the union organisation they're in... generally speaking it's going on whatever their processes are for appointing or electing existing reps' (National Officer, large general union).

'At this moment in time it's open to any member. What we would like is to attract newer people into being trade union activists and so far, our profile of Union Learning Reps is that they are all non-traditional trade union members. So they are mostly women from black, minority ethnic groups' (National Officer, small professional union).

A number of unions stressed that decisions about the election and appointment of ULRs would be made at branch or workplace level, rather than by the national union, and there was awareness that approaches would be different in different workplaces:

'Shop stewards decide the best form of action. We've had union learner reps by election, we've had learner reps by agreement with the employer, and we've also had learning reps who've been appointed solely by the union' (National Officer, large general union).

Although most unions were keen to attract new activists to the role, this was rarely defined in formal policy or strategy. In other words, unions appear to be taking a pragmatic approach to the development and growth of the ULR role. Where unions did have strategies they tended to be recent developments, and were often regarded as 'work in progress'. One officer from a small professional union explained this as follows:

'I think it's quite an intensive role really when done properly, and I think if you are an existing branch secretary or something the branch secretary work tends to be given up and we don't want that. We want more people involved, rather than people doing other things. If they can combine some learning work or support of learning or part of a learning reps role then that's fine, but if its replacement of mainstream union activity then I think that's detrimental' (National Officer, small professional union).

Here as elsewhere the interviews identified a potential tension between union learning activity and other union activities. Another officer said that the union's strategy towards the ULR role was still evolving:

'Initially we were very keen to try and ensure that the union learning reps saw their role as union learning reps. We focused on existing shop stewards so that we could make sure that these people realise that they were union reps and understood the role of the union, rather than thinking of themselves as unpaid assistants to the company training department. More recently, and particularly since the new legislation, we are more confident that we can handle any issues relating to people being unsure what their role as a learning rep is and consequently, we've involved more non reps' (National Officer, retail union).

4.2 The impact of the ULF on union agendas and organisation

Union learning has been introduced in a period in which unions have struggled to 'modernise', to redefine their role, and relevance in the workplace in the context of membership decline and some commentators have suggested that it would appear to have some potential for membership renewal and organisation in the workplace (Forrester, 2001, 2004). This section focuses on the relationship of union learning to wider union agendas at both national and workplace level. It considers the impact of union learning on recruitment and retention and the integration of union learning and the ULR role into existing trade union structures.

The integration of ULRs

The ULR survey suggests that the majority of ULRs appear to be integrated into the local union. Table 6 shows that nearly eight out of ten (78 per cent) of ULRs said they had attended at least one workplace union meeting, with seven out of ten having done so more than once in the past 12 months. Over two thirds (68 per cent) had spoken in union meetings at least once and the majority appeared actively engaged in their branch. Fewer had attended meetings outside the workplace, but half (53 per cent) had done so more than once in the last 12 months. A very small proportion had attended any union women's or black members or gay and lesbian or disabled members' meetings, although this is likely to reflect the profile of the respondents. For approaching half of respondents (41 per cent) their activism extended to attending union conference, although it was not clear this was in their capacity as a ULR.

Table 6: Other Union Activity					
	Number (%)				
<i>In addition to your ULR activity in the last 12 months have you:</i>	<i>More than once</i>	<i>Once</i>	<i>Never</i>	<i>Missing</i>	<i>Total</i>
Attended union workplace meetings	251 (71.1)	25 (7.1)	59 (16.7)	18 (5.1)	353 (100)
Spoken at union workplace meetings	213 (60.3)	24 (6.8)	83 (23.5)	33 (9.3)	353 (100)
Attended union meetings outside the workplace	188 (53.3)	32 (9.1)	97 (27.5)	36 (10.2)	353 (100)
Attended any women's/black members/gay and lesbian or disabled members meetings	29 (8.2)	10 (2.8)	248 (70.3)	66 (18.7)	353 (100)
Attended any regional ULR meetings	118 (33.4)	70 (19.8)	130 (36.8)	35 (9.9)	353 (100)
Attended union conferences	99 (28.0)	47 (13.3)	154 (43.6)	53 (15.0)	353 (100)
Voted in union elections	239 (63.2)	54 (15.3)	36 (10.2)	24 (6.8)	353 (100)
Distributed union literature	223 (63.2)	29 (8.2)	72 (20.4)	29 (8.2)	353 (100)
Read union newspaper	291 (82.4)	17 (4.8)	28 (7.9)	17 (4.8)	353 (100)
Read any other union literature	291 (82.4)	20 (5.7)	20 (5.7)	22 (6.2)	353 (100)

Generally, a picture of activism emerges, but there is a group of ULRs (just fewer than one in five) who appear to be less integrated. One half (50 per cent) of respondents had reported back on their activities to their union branch or works committee, a quarter had not. New activists were less likely to have taken part in other union activities. Of this group under half (45 per cent) had attended union workplace meetings, compared to nearly nine out of ten (87 per cent) of those with other positions.

All in all, the integration of ULRs into the wider union did not emerge as a major issue in the ULR survey because most respondents were existing activists who combined union learning with another union role, such as workplace rep or health and safety. However, there may be a concern for trade unions that around one fifth (17.8 per cent) of respondents have never attended a union workplace meeting.

Support for the ULR role

ULRs were asked to list the sources that they had received information on union learning from, and also to choose the three that had been most useful. Table 7 shows that three quarters (78 per cent) of respondents to the ULR survey had received information from the union posted to their homes, and a similar proportion had received information from union newsletters (75 per cent). This suggests that despite the difficulties unions report in terms of tracking and maintaining ULR records, some union networks and mailing lists are in place and are valuable sources of support and information for ULRs. More than 40 per cent of respondents said they had received information from a full-time union officer, and more than half had received information from a project worker. The least common source of information was Human Resources/Personnel Manager, or Line Manager (eleven and two per cent respectively). The sources of information ranked as most useful were union learning project workers (44 per cent) and union materials posted to the home (43 per cent). This suggests that union efforts, supported by the ULF, to appoint dedicated learning project staff and develop databases and ULR networks are valued by ULRs.

Table 7: From which of the following have you received information on union learning matters and which were the most useful?		
	%	
	Received	Most Useful
Union meetings	47.9	19
Union newsletters	74.8	33.7
Word of mouth from other union members	44.5	16.7
Union material posted to my home	77.9	42.7
Union email	36.1	15.2
A full time officer	43.2	17.9
Union learning project worker	59.4	43.7
Union web site	37.4	10.5
Human resources or personnel manager	10.7	2.0
Line manager	2.1	1.2
Other	4.1	0.6
Total	100	100

Just over half (56.6 per cent) of ULRs surveyed felt the union was doing a very good or good job of supporting ULRs. A quarter (26 per cent) categorised it as neither good nor poor, one in ten (10 per cent) as poor and a small minority (four per cent) as very poor. The new activist group, were slightly more critical than the existing activist group (49.4 per cent thought the support was very good or good compared to 58 per cent of

the existing activist group). Those ULRs that had received only basic ULR training were more critical than those who had received further training (52 per cent considered support good or very good compared to 61 per cent of the latter group). The perception of support varied very little between unions and according to how long the ULR had been in post.

	Number (%)
Very Good	67(19.2)
Good	132 (37.4)
Neither good nor poor	92 (26.1)
Poor	36(10.2)
Very Poor	14 (4.0)
Missing	12 (3.4)
Total	353 (100)

The case studies, however, suggested that experiences of wider union support, particularly from full-time and negotiating officers, was variable:

‘In my experience full-time officers haven’t taken much interest in the learning agenda’ (ULR, aerospace).

‘We’ve had good support from (another ULR’s) union, (another ULR’s) full-time official. I’ve got to be honest and say I’ve had very poor support from my union’ (ULR, manufacturing).

In the national union survey a number of national officers reported resistance to union learning, with some full-time officers and senior lay representatives being reluctant to get involved or to prioritise it in their work:

‘I know there’s a number of people in the movement that have concerns about the role of learning reps because it focuses a lot on partnership and there’s obviously very different views about that. But I think we need to make sure that they’re trained properly so that you don’t get them running off thinking it’s all going to be lovely... because that can turn a branch and activists off the whole thing’ (National Officer, professional, technical and clerical union).

In most cases, ULRs said they relied on support from TUC Learning Services, or where available, from dedicated union learning project workers. The level of support varied between unions and workplaces and, to some extent, depended upon the experiences of ULRs. Those ULRs who were also shop stewards or workplace reps, or had a history of union activism, appeared more likely to be satisfied with the support they had received from the union.

'TUC support has been excellent all the way through. And the union, certainly the last two or three years, has been great. To start off with too much was left to the full-time officer. With all his areas to look after, you know, wage negotiations and everything, learning was just another burden on him. Well, I mean, I didn't have much support from him on learning, he would just ring me every now and again and say how's it going. But I think since they've got the specific learning project workers, it has been a lot better. A full-time officer just cannot deal with learning on top of everything else he has to do' (ULR and workplace representative, food manufacture).

Union learning activities

In interviews most ULRs described their day-to-day role as being about liaising with local colleges to arrange courses (particularly where the ULR was responsible for a learning centre), promoting courses and disseminating information. In the words of one ULR:

'(I'm) mainly a mediator ... I tie in with the tutor ...to find out what new courses are available. On a day-to-day basis, there's things like people coming up and asking (for) suggestions for courses and stuff like that. We have monthly (learning centre steering committee) meetings that I can go back and report on what the learning centre is doing' (ULR, aerospace manufacture).

In most cases, ULR activities, particularly those linked to workplace learning centres, appeared to focus on a fairly narrow range of courses: IT - particularly CLAIT (a Certificate/Diploma for IT Users) and European Computer Driving Licence (ECDL) qualifications - and basic skills (literacy, numeracy and English for Speakers of Other Languages). Some ULRs were also trying to arrange language courses (such as French and Italian) and digital photography courses. In general, the range of courses appeared to be mainly influenced by the availability of external

funding and the recommendations of learning providers. A number of ULRs had also carried out learning needs surveys in their workplace. In all cases, courses were provided outside working hours and to fit around shift patterns. However, there were examples where employers had agreed to release staff to participate in basic skills courses and vocational training (such as NVQs and Modern Apprenticeships) was normally provided during company time.

Learning and organising

The potential links between union learning and building workplace organisation were emphasised by union officers in the national union survey. However, it was not clear how far such links were being exploited in practice. Although most union officers had a sense that union learning has a positive impact on recruitment, few had any evidence of this, usually because the union lacked the resources to capture such information:

'We've had a few instances where we've negotiated learning agreements with companies and that's actually led to increased membership. Where people have seen that the union is doing something positive that can actually help their careers, that has had some positive spin-offs' (National Officer).

'Some of the organisers will, you know, use the learning agenda as a way to recruit people, but I guess what we haven't done is capture any data about how that's working' (National Officer, finance union).

ULRs also perceived a link between learning and organising. The ULR survey showed that the majority of respondents (71 per cent) had tried to encourage workers to join the union in their capacity as a ULR, and where they had done so nearly a third (32 per cent) said that membership had increased as a result of learning initiatives. The fact that a higher proportion had not seen membership increases may be due to the fact that the majority of respondents were in workplaces with relatively high proportions of workers in membership (the median membership was 80 per cent, more than one in ten reported 100 per cent membership in their workgroup).

The workplace case studies also suggested that, in most cases, membership had increased as a result of union learning. For example, at one large finance sector organisation the ULR said she was aware of

people joining the union in order to access union learning opportunities. However, this ULR (who had not taken part in any ULR training, and was not formally recognised as a ULR by her employer) did not see recruitment as part of her role, but said it had happened naturally as word spread about the learning opportunities available for members:

'I don't actually approach people and say "This course is great, but you can't have it unless you're a union member"...It's word of mouth I would say' (ULR, finance sector).

At another banking call centre, however, the ULR clearly did regard recruitment as an important part of her role. She had personally recruited four new members by talking to them about the benefits of union membership, particularly learning opportunities, and had subsequently registered these new members on union learning courses.

The ULR quoted below, on the other hand, felt that union learning had had little impact on membership levels in his workplace.

'I don't think it has, so far, because we've not achieved much. But I think as we get this project off the ground it will start to have more of an impact... once the union can start delivering something they (members) want' (ULR, aerospace).

In a small print company, where union density was already high on the shop floor, union learning had helped to boost membership amongst administrative staff:

'We do use it (the union learning centre) for recruitment. We do pick up... When we take on new employees they do an induction, part of that is they come in here (the union learning centre) for about 20 minutes with me. I explain all the benefits of what's here, explain it is a joint project with the company and give them the union application forms' (ULR, print sector).

The ULR survey suggested that a substantial proportion of ULRs do not see their role as confined only to union members. Just under half (44 per cent) of respondents had undertaken ULR activities on behalf of employees who were not union members – only just over a quarter (30 per cent) had not. Again, this was echoed in the case studies where almost all union learning activities and projects were also open to non-members. The exception to this was a finance sector project, where a

range of distance learning courses were provided and funded by the union itself, and did not draw on external funding.

In general, union learning centres were open to all employees. In the words of one union project worker:

‘...as a union it’s something we’re pretty keen on anyway. It’s our job to recruit off the back of it. It’s not about being exclusive to union members’ (union learning project worker).

The ULR in a small leather-processing factory explained the decision to open the learning centre to non-members as follows:

‘We made the decision that it was only fair to do it for other people as well and hopefully encourage them to join the union because they could see the benefits. We could have said it’s just members, but I think that would have been short sighted’ (ULR, manufacturing).

Nevertheless, the union hoped to access further funding which may make it possible to offer courses free of charge or at discounted rates to members in the future:

‘We’ll try and use that as a recruitment tool to try and get people back in, saying, “look, union members are paid for, non union members aren’t”’ (ULR, manufacturing).

‘What the union should take on board is that it’s very high profile from the members point of view because most of them have no involvement with the union, apart from voting for a pay claim. This (the learning centre) is something that can raise the profile, its right on the shop floor and we can promote it as this is what your union money is providing’ (ULR and shop steward, manufacturing).

In all the case studies, ULRs were concerned about recruiting and retaining learners on courses. This was often linked to funding issues, and was described as a major concern of the college or course provider. In a couple of workplaces concern about course recruitment and drop-out rates had prompted the union to open the learning centre to retired members, friends and family of staff, or other companies nearby. In the words of one ULR:

'We do get people bringing their wives, mothers (to the learning centre)...and we've had retired members come in ...The oldest was about 88' (ULR, manufacturing).

Although not all unions had taken this step, it does suggest the potential for union learning to extend beyond the workplace and beyond union members to the local community.

4.3 Employment relations and collective bargaining

According to the ULR survey, ULRs are overwhelmingly based in workplaces where the employer already recognises the union (98 per cent of respondents were in recognised workplaces). This indicates that there may be some difficulty in establishing union learning in workplaces where there is no existing relationship with the employer. This section focuses on employer support for union learning, in terms of learning agreements, paid time-off and facilities for ULRs. It considers the impact of union learning on workplace employment relations and how far union learning may be conducive to cooperative relations between employers and unions. It also explores how far union learning at workplace level is developing separately from union collective bargaining agendas and existing union structures and processes.

Time-off for ULR activities

The establishment of statutory rights to paid time-off for ULRs has clearly been a key development in the development of union learning. The national union survey suggests that statutory rights have been an important lever in discussions with employers:

'Where we've made progress, (we've used) the legislation as a backdrop. Certainly in (national bank), we wouldn't have got that agreement had the negotiator not been prepared (to say) either we make an agreement or I'm just going to appoint (ULRs)' (National Officer, finance union).

However, two officers stressed that, to date, their union has deliberately avoided focusing on legal entitlements. The emphasis has been on developing partnerships with employers with whom the union already enjoys a positive relationship.

‘All the employers are very much aware that (statutory rights are) in the background, but the whole emphasis of what we’ve been trying to do has been based on partnership and best practice. We very much tried to say “this is what we’ve done so far, we’ve had some time off to do such and such a task, and this is the result”. We don’t particularly want to go down that road (of statutory rights) unless we have to’ (National Officer, general union).

‘We’ve targeted the easy ones. Given time they (the statutory rights) will be used, but I don’t think it will be in the near future because there are too many companies where there will be a degree of business done. It’s only when they are exhausted that the statutory rights will come into play’ (National Officer, large general union).

The ULR survey shows that most ULRs are likely to get paid time-off for training (82 per cent), but are less likely to get paid time-off for other ULR activities (54.6 per cent) (Table 9).

	Number (%)
Facilities for meetings	329 (93.2)
Time off with pay for ULR training	288 (82)
Use of telephones	265 (75)
Union notice board	269 (76.2)
Photocopying facilities	273 (77.3)
Use of an office	246 (69.6)
Use of internal mail	231 (65.4)
Access to email	207 (58.6)
Access to internet	195 (55.2)
Time off with pay to carry out your role other than on training	193 (54.6)
Fax facilities	155 (43.9)
Other	28 (7.9)
Total	*353 (100)

* Respondents were asked to tick all that applied

Despite the existence of statutory rights, a proportion of ULRs are undertaking basic activities in their own time. Just under one in five (18 per cent) provide information and advice to members about learning without paid time-off, and more than one in ten (14 per cent) identify members’ learning needs on the same basis (Table 10).

Table 10: What activities have you undertaken as a ULR?						
	Number (%)					
	With paid time off at work	Without paid time off at work	Both Paid and Unpaid	Activity not carried out	Missing	Total
Providing information/ advice about learning to members	214 (60.6)	64 (18.1)	16 (4.5)	26 (7.4)	33 (9.3)	353 (100)
Identifying members learning needs	183 (51.8)	48 (13.6)	14 (4.0)	61 (17.3)	47 (13.3)	353 (100)
Arranging courses for members	160 (45.3)	33 (9.3)	11 (3.1)	93 (26.3)	56 (15.9)	353 (100)
Formal discussions with the employer	170 (48.2)	15 (4.2)	4 (1.1)	109 (30.9)	55 (15.6)	353 (100)
Informal discussions with the employer	209 (59.2)	35 (9.9)	7 (2.0)	56 (15.9)	46 (13.0)	353 (100)
Involvement or liaison with a workplace learning centre	119 (33.7)	23 (6.5)	12 (3.4)	122 (34.6)	77 (21.8)	353 (100)
Doing one or more of the above on behalf of non union members	113 (32.0)	41 (11.6)	7 (2.0)	106 (30.0)	86 (24.4)	353 (100)
Reporting back on activities to a branch/works committee	136 (38.5)	33 (9.3)	7 (2.0)	96 (27.2)	81 (22.9)	353 (100)
Taking part personally in a learning course	161 (45.6)	60 (17.0)	12 (3.4)	57 (16.1)	63 (17.8)	353 (100)
Taking part in a ULR training programme	265 (75.1)	11 (3.1)	6 (1.7)	29 (8.2)	42 (11.9)	353 (100)
Other	23 (6.5)	8 (2.3)	4 (1.1)	33 (9.3)	285 (80.7)	353 (100)

Overall, the vast majority (76 per cent) of ULRs carried out union learning activities in their own time; only one in five said they did not. This did not appear to be linked to whether they got paid time-off from their employer. However, new activists were slightly more likely than existing activists to undertake activities in their own time (78.5 per cent compared to 75 per cent of existing activists). This may reflect the commitment of new activists or the fact that they did not have any other union responsibilities. It could, however, also reflect employer resistance, or lack of understanding about legal rights. On average ULRs spent three hours of unpaid time, a median of two hours a week. Over one in ten (14 per cent) spent five or more hours of their own time a week.

Table 11 shows the facilities ULRs are afforded by their employer to carry out their role. The majority had access to basic administrative support such as the use of telephones, photocopying and access to internal mail – but there was a proportion (25 per cent, 23 per cent and 35 per cent respectively) that did not. Access to email, internet and fax was less likely to be provided, but this may reflect access within the workplace generally. In the ‘other category’ one respondent reported that, ‘everything we need we are given’ and another got ‘anything that I need’. Two respondents mentioned having access to IT equipment. In one case, however, the ULR qualified their response with, ‘not that I have permission, I just use them’.

	Number (%)
Facilities for meetings	329 (93.2)
Time off with pay for ULR training	288 (82)
Use of telephones	265 (75)
Union notice board	269 (76.2)
Photocopying facilities	273 (77.3)
Use of an office	246 (69.6)
Use of internal mail	231 (65.4)
Access to email	207 (58.6)
Access to internet	195 (55.2)
Time off with pay to carry out your role other than on training	193 (54.6)
Fax facilities	155 (43.9)
Other	28 (7.9)
Total	*353 (100)

* Respondents were asked to tick all that applied

Learning agreements

According to the TUC, learning agreements aim to ‘embed the union role in lifelong learning and workforce development’ (TUC, *Promoting Learning Agreements, 2003*). Learning agreements should establish the roles and responsibilities of union representatives (including ULRs) and managers, and establish joint workplace mechanisms for coordinating and monitoring union learning activity.

Over two thirds (67 per cent) of ULRs surveyed reported that the union had approached the employer for a learning agreement. However, only just over a third (35 per cent) reported that there was a learning agreement in place between the union and employer, although in nearly half (48 per cent) of cases where the union had made an approach an agreement had been concluded. In over a third of workplaces (42 per cent) there was no agreement. Two thirds (69 per cent) of learning agreements were written agreements, seven per cent were less formal and nearly one in five (18 per cent) of respondents were not sure of the form the agreement took.

In the national union survey, national officers suggested that the ULF and other workplace learning funds (such as local LSC and Regional Development Agency funds) have had an enormous impact on the development of workplace learning agreements:

‘We couldn’t do it without the funding, (the union) wouldn’t sustain it. There’s no way we’d pursue the sort of training partnerships and the direct delivery without funding’ (National officer, construction union).

However, national officers had difficulty providing information about learning agreements in place in their unions. Partly, this was because learning agreements tend to be dealt with at regional and workplace level, by negotiating officers or, in some cases, learning project workers. Most national officers said the union did not have the resources to collect information about learning agreements centrally.

Interviews with national officers revealed different understandings of what constitutes a learning agreement, ranging from formal written agreements to less formal practices or workplace arrangements. There may also be different levels of agreement:

'We have, oh, three corporate national agreements, what we consider an agreement, it would be wise to call them joint policies I think ... jointly signed. We have a number of local joint policies and then we have beneath that a whole set of sites where learning committees have been established and where there have been terms of reference agreed for those learning committees. So there's different levels of agreement in different places. We've also got two good practice documents that have been more or less agreed with the relevant employers' (National Officer, retail union).

Another Officer commented that:

'Some companies are very hesitant about having an agreement but are quite happy to have some sort of a statement of intent or perhaps a less formal agreement, and work on the practical side and see how they develop' (National Officer).

Officer interviews suggest that formal, written agreements may be likely to follow in the wake of a learning project, but would be unlikely to precede it:

'The general approach is that we try and get initiatives up and running and then try and consolidate these in the form of agreements. So there's two questions here: have we approached companies and have they refused to have anything to do with us in promoting access to learning? The answer is yes. And the next question is: who has refused to sign an agreement with us, after we have managed to get things going? And I think generally the record is that there are tactical considerations about when we say we want an agreement, but broadly speaking we get an agreement' (National Officer, retail union).

This was also generally found to be the case in the workplace case studies. However, at one workplace, a food manufacturer, the development of a written learning agreement had actually preceded the workplace learning centre. In all workplaces where a union learning centre had been established, or was in the process of being set up, unions had either agreed or were working towards a learning agreement.

'We did put forward a draft learning agreement... but because of one thing and another priorities change and it went off the agenda. As union reps we decided to change the focus,

particularly when we knew... that the TUC had managed to get this money available. We decided that we'd focus on finding out what people wanted and getting courses up and running before we actually signed up to a formal agreement' (ULR, aerospace).

Most ULRs felt that a learning agreement was important in terms of securing the long term future of the learning centre. However, employers often took a different view of the function and relevance of a learning agreement:

'I don't think it changes life any. When it comes down to the cold hearted decision of shall we allocate resources to this training or not, the decision ends up being the same. We don't want to be a company that shut the door for the last time and they say, well, they've gone bankrupt, but they had a really good training agreement. It doesn't count for anything really' (HR manager, manufacturing).

According to national union officers, the main barriers to concluding learning agreements are employer resistance, the lack of a statutory entitlement to paid educational leave, lack of time for ULRs to carry out their role and the reluctance of negotiating officers to prioritise union learning. Inexperience and lack of confidence on the part of ULRs new to union activism was also mentioned as a possible barrier, but this was seen as something that would change over time and that could be addressed by training and support for ULRs. For the officer quoted below, the biggest barrier was resistance from both employers and, in some cases, union negotiators:

'There is the fear of the employer, about control. It can be from the shop stewards committee actually not seeing learning as being part of trade union business. But where we've found that good business has taken place in regards to lifelong learning the employers are more willing to get involved (in) a formal learning agreement' (National Officer, general union).

The same points were emphasised in the ULR survey. For example:

'Management is disinterested and I don't think the issue has been pursued by the union hard enough' (ULR).

'This (a learning agreement) does not appear to be one of the main priorities to senior management and senior reps' (ULR).

'I am attempting to negotiate a learning agreement, but am meeting resistance from management' (ULR).

This lends support to claims that union learning is a contested area (Ross, 2000).

Links with collective bargaining agendas

Respondents to the national union survey suggested that negotiating officers are not systematically incorporating union learning into collective bargaining agendas and there were few examples of unions establishing formal relationships between learning and bargaining.

'Some (negotiating officers) are definitely using it. Some are kind of just pretending they are using it, but not really. Generally speaking the biggest problem that we've got is getting the negotiators to run with their own agenda' (National Officer, finance union).

'Our more enlightened officers use the agenda, some don't. We've got to win the argument there' (National Officer, print union).

However, the national union survey did reveal some examples where unions were developing strategies for linking learning with collective bargaining:

'We've tried to set up a system where we fit a team together with the company so we (learning project workers) would explore developing a learning agreement. We start with the (union learning agreement) template and just do general review and development, ironing out some of the issues. It would then be handed over to the negotiating team within the company' (National Officer, rail union).

In all the workplaces studied in the case studies, union learning was treated as separate from the collective bargaining agenda. In the words of one ULR, union learning would not be discussed at other management/union forums because:

'The company probably ... would turn around and say, "well, hang on a minute, that's just for the steering committee, that's for

the learning reps and learning centre only". They do tend to keep all the meetings separate... We had a (learning centre) steering committee meeting, and it was, well, OK, we know there are redundancies going on but we won't talk about that. We want to keep things separate' (ULR, aerospace).

In most cases, workplace learning forums or learning centre steering committees provided the forum for discussion about ULR activities, and were usually focused specifically on the running of a workplace learning centre. However, in one finance sector workplace there were no formal arrangements in place for discussing union learning issues. The ULR was not formally recognised in her role, and carried out union learning activities on an informal basis.

In most cases, ULRs were not aware of any other collective bargaining arrangements over training or learning. However, it was generally felt that the existence of union learning had, indirectly, helped to improve training opportunities in the workplace:

'There was lack of training full stop on site anyway, ... there was no sort of training whatsoever' (ULR, printing).

'I think we (the union) lead the company into this learning, certainly. We pushed them into it. And they've obviously started to reap the benefits now. But it was painful... I was surprised with the NVQs when they were introduced because obviously it's a portable qualification, so they are taking a risk there. People can get a level 2 or level 3 qualification and take it away somewhere else... We'll always have our differences. Things aren't 100 per cent all the time but our relationship certainly has improved a lot' (ULR, food manufacture).

The impact on employment relations

The union learning agenda has been characterised as dependent upon partnerships with employers (Clough, 2004; Stuart and Cooney, 2004; Wallis and Stuart, 2004) and may be seen as encouraging consensus rather than what might be seen as the more conflictual terms of a collective bargaining agenda. The workplace case studies suggest that union learning can have positive outcomes for both the unions and employers involved.

'I think this project has improved matters... We tend not to have arguments over what happens with this... Whereas perhaps other areas of industrial and employment relations there is a bit more of a them and us and we're horse trading in negotiations, with this it's fairly neutral territory. In that way I'd say it's made a fairly positive contribution to management and union relations' (HR manager, manufacturing).

At the same time it has been suggested that union learning has tended to be established in workplaces where unions are embedded, and it is possible that union learning is more likely to develop where existing management/union relationships are already co-operative.

'If you'd asked me what are your working relationships like with the union here I would have said essentially fine anyway. So they weren't going to become wonderful because of this, but ... they can't be any worse. They weren't bad to begin with and if they were I don't think this would necessarily be the cure, though it might have helped' (HR manager, manufacturing).

In other workplaces managers reported that union learning had had a positive impact on other aspects of management/union relationships:

'The fact that you can have a productive and useful conversation about this means that the next time you have a conversation in a more difficult area you sort of feed on that. Life is all about give and take anyway, and here's an area where we can be fairly open handed, generous is the wrong word, just conciliatory and get on with things' (HR manager, manufacturing).

'One of the things we despaired about previously, and I wouldn't blame the union for it, but we had a fantastic level of distrust... We've worked very, very hard to be much more open about what's going on, to communicate better, and I think we've got better at that' (Manager, food manufacturer).

However, the ULR quoted below (at a print company) felt that, although union learning had helped to improve relationships between management and employees in general, it had had little impact on relations between management and shop stewards:

'There is a little bit of a softening of the attitude towards the company from members who are coming in here (to the learning

centre) and reaping the benefits. But basically, between the union and the company it is still the same...There is still this, mistrust is too strong a word, this wariness of the company motives. It's not bad, it's not antagonistic, but (the union) is still wary of what's going on' (ULR, printing).

More than half of respondents to the ULR survey (55 per cent) strongly agreed or agreed that union learning encouraged co-operation with the employer on learning issues, but a quarter neither agreed nor disagreed and one in ten (10.4 per cent) disagreed or strongly disagreed (Table 11). Perhaps unsurprisingly those in workplaces with a learning agreement in place were more likely to believe there was co-operation over learning (71 per cent compared to 48 per cent where there was no agreement). Interestingly new activists appeared less likely than existing activists to agree with the statement that union learning encouraged co-operation over learning issues (43 per cent did so compared to 56 per cent of existing activists). New activists were more likely to say that it neither encouraged nor discouraged co-operation; this may be because their more limited experience of management-union relations meant they had less context to make a judgement.

	Number (%)
Strongly agree	80 (22.7)
Agree	115 (32.6)
Neither agree nor disagree	90 (25.5)
Disagree	28 (7.9)
Strongly disagree	9 (2.5)
Missing	31 (8.8)
Total	353 (100)

Respondents were less likely to believe that the existence of union learning encouraged co-operation between the union and employer on issues other than learning (Table 12); just over a third (39 per cent) agreed or strongly agreed that it did, but a similar proportion (38 per cent) neither agreed nor disagreed with the statement and just over one in ten (12 per cent) disagreed or strongly disagreed. Once again those ULRs in workplaces with learning agreements were more likely to agree with the statement (49 per cent compared to 34 per cent). Again, new activists were less likely than existing activists to agree with the statement (22 per cent compared to 44.2 per cent). Over half (57 per cent) said they neither agreed nor disagreed with the statement. Once again it may be that new

activists felt they had nothing with which to compare any current co-operation.

Table 12: The existence of union learning encourages co-operation between the employer and the union on issues other than learning

	Number (%)
Strongly agree	38 (10.8)
Agree	100 (28.3)
Neither agree nor disagree	134 (38.0)
Disagree	30 (8.5)
Strongly disagree	12 (3.4)
Missing	39 (11.0)
Total	353 (100)

The impact of the ULR

One reason why union learning may be seen to encourage consensual relations is that it may require only limited commitment from the employer and does not represent resources to be contested or bargained over by the union. Evidence from the workplace case studies suggests that the existence of the ULF is important to both unions and management in terms of supporting learning activity.

At one manufacturing company, for example, both the ULR and manager felt that the fact that the learning centre was supported by external, government funds, was crucial, not only to its existence, but to its survival and acceptance by employees. The manager argued that, had the learning centre been established with company money, it could have led to more demands from staff, for example, for pay rises. The ULR, on the other hand, reported that the membership might have felt that learning was a waste of union resources:

‘It can’t be argued that “you’ve spent a lot of money on the learning centre, why don’t you spend it on us directly”. That argument isn’t there. I think had we as a company invested a load of money in this for what could be said is a small minority of people, that might have created an argument. People can say “you’ve spent money on that, why don’t you pay us more money or buy us a new machine”’ (HR manager, manufacturing).

‘The biggest question (from members) is: “ is it our money that we pay in every week?”. It’s not, it’s separate education money that is being provided by the government... It is nothing to do

with whatever they (the members) pay every week' (ULR, manufacturing).

The fact that the learning centre is funded largely by the ULF may also give the union some control and independence from the company. In the words of one ULR:

'(The learning centre) is union controlled. Other (learning centres) with the companies putting money in, they've got a bigger say from the companies. Whereas we haven't here' (ULR, manufacturing).

However, in another workplace, the ULR argued that the fact that the union learning centre had been set up with minimal external support was important to its long term survival and sustainability. Although the employer's contribution had essentially been the same as the cases described above (i.e. the employer had provided a room to accommodate the learning centre) the union had managed to equip the learning centre with very little ULF support.

'I think you need that...with a big budget I wouldn't have had the strength of feeling that I do' (ULR, food manufacture).

Section 5: Summary

This section summarises some of the key findings emerging from the research:

The role and experiences of ULRs

- The main motivating factor for becoming a ULR is a commitment to education, but this is within the context of union activity;
- The majority of ULRs are existing union activists, but nearly a quarter of respondents to the ULR survey were ‘new activists’ who were union members but did not or had not held another position in the union;
- These new activists were more likely to be women, black or minority ethnic and to be younger. This confirms TUC research that union learning is attracting a new group of activists to the union movement;
- New activists appeared to have some distinctive values, although these may change as a result of activism. Initially new activists appear less likely to be motivated by political commitment and a belief in trade unionism than existing activists.

The impact of union learning on union agendas and organisation

- Since most ULRs are existing union activists most are integrated into the union. However, there may be a concern that around one fifth (18 per cent) of respondents have never attended a union workplace meeting and new activists were less likely to have taken part in other union activities;
- Most ULRs were satisfied with the support they received from the union, although a proportion were not. Most ULRs relied on support from TUC Learning Services, or where available, from dedicated union learning project workers. Experiences of support from the wider union, particularly from full-time and negotiating officers, was more variable;
- The majority of ULRs had tried to encourage learners to join the union in their capacity as a ULR and where they had done so nearly a third reported that membership had increased as a result of learning initiatives;

- A substantial proportion of ULRs had undertaken union learning activities on behalf of employees who were not union members, suggesting the potential of union learning for union renewal in the workplace.

The impact of union learning on employment relations and collective bargaining

- ULRs are overwhelmingly based in workplaces where the employer already recognises the union suggesting that there may be some difficulty in establishing union learning in workplaces where there is no existing relationship with the employer;
- Despite statutory rights ULRs are most likely to get paid time-off for training, but are less likely to get paid time-off for other ULR activities. The vast majority of ULRs carry out their activities in their own time;
- A significant proportion of ULRs do not have access to basic facilities or admin support at work, such as the use of telephones (25 per cent), photocopying (23 per cent) and access to internal mail (35 per cent). Access to email, internet and fax were even less likely to be provided, although this may reflect access within the workplace generally.
- Over two thirds of ULRs reported that the union had approached the employer for a learning agreement, but only just over a third (35 per cent) reported that there was a learning agreement in place between the union and employer. In nearly half (48 per cent) of cases where the union had made an approach an agreement had been concluded.
- The main barriers to concluding learning agreements are employer resistance, the lack of a statutory entitlement to paid educational leave, lack of time for ULRs to carry out their role and the reluctance of negotiating officers to prioritise union learning;
- Unions are not yet systematically incorporating union learning into collective bargaining agendas and there were few examples of unions establishing formal relationships between union learning and bargaining;
- There are suggestions that in the workplace union learning is developing separately from wider employer-union structures and processes;

- Union learning had had positive outcomes for both the unions and employers involved and for workplace industrial relations, although it is possible that union learning has tended to be established in workplaces where existing management/union relationships are already co-operative. Just over a third of ULRs surveyed agreed that union learning encouraged co-operation between the union and employer on issues other than learning, but a similar proportion neither agreed nor disagreed with the statement and just over one in ten disagreed;
- The existence of the ULF is important to both unions and management in terms of their support for workplace learning activity. External government funding was thought to be key to the survival and acceptance of union learning by employers and, in some cases, by union members.

Section 6: Conclusions

Previous evaluations suggest that the ULF has had an enormous impact in terms of funding workplace learning projects; engaging adult learners and supporting the training of ULRs. This research explored the impact of the ULF on trade unions, employers and employment relations. Drawing on data gathered from full-time trade union officers, ULRs and employers at national union and workplace level, it focuses on three main areas of analysis: the emergence of the ULR as a new category of union activist, the implications for union organising and collective bargaining agendas, and employment relations in the workplace.

The research suggests that unions that have attracted funding ULF funding are more likely to have engaged with the issue of workplace learning and are more likely to have developed policies or strategies on it. Nevertheless the proportion of unions that have developed formal policies is small. The national union survey suggests that most unions are taking a flexible and pragmatic approach to the learning agenda. For example, few unions formally recognise the ULR role in their rulebooks or constitutions. There is limited evidence that unions are formalising union learning within their structures and organisation at national level and some evidence of ambivalence, or even resistance, to the learning agenda within unions.

The ULF may be seen as encouraging unions to focus their learning activities upon specific government and employer-led target areas, concerned particularly with skills development, vocational training and professional skills as part of an agenda promoting individual employability and productivity (Forrester, 2004). The ULR survey suggests that ULRs tend to be motivated by a commitment to education in its widest sense, and that, for ULRs at least, union learning is not just about employability. Nevertheless, the workplace case studies indicate that union learning activities tend to be overwhelmingly focused on certain types of course, particularly ICT, basic skills (literacy and numeracy), and, in some cases, vocational training. This may suggest that the opportunity to develop a wider agenda based upon workers' rights to access to education and training has not yet been developed.

Surprisingly, just four per cent of ULRs surveyed had been elected to the role. This may raise some questions about the recognition, status and accountability of the ULR role. Whilst the majority of ULRs are existing union activists, the survey lends support to the TUC's claim that union

learning is attracting a new layer of activists to the movement who are more likely to be women, black and younger. However, these activists tend to be existing union members working in areas where the union is recognised and where there are already high levels of unionisation.

The research also raises questions regarding the integration of ULRs, particularly new activists, into the wider union and the support they receive from their employer and trade union. According to the ULR survey new activists are less likely to feel well supported by the union and are less likely to participate in other union activities, such as workplace and branch meetings. Given the apparent potential of union learning for recruitment and union activity the challenge for unions may be not only to look at how ULRs are supported, but how far learning activity can be extended to workplaces where the union is not already recognised or strong.

The research suggests that union learning is not yet a mainstream union issue. Case study and interview data indicates that although the links between union learning and organising are recognised by ULRs they are rarely explicit at national level. The restriction of the learning agenda to areas where unions are already embedded means that the potential relationship between learning and organising has not been fully exploited.

It appears that, so far, union learning has been developed in isolation from wider union agendas and particularly from the collective bargaining agenda. This may be reflected in the problems some ULRs are experiencing in gaining time-off and facilities from their employers beyond initial training. The promotion of union learning as something outside of existing industrial relations and reliant upon co-operation with the employer runs counter to the more adversarial notion of organising workers. This may have helped to create some suspicion in parts of the union movement towards union learning and discouraged the mainstreaming of the agenda.

References

Antill, M., Cutter, J., Brass, J. Mortimore, C., Rodger, J., and Shaw, N. (2001) '*An Evaluation of the Union Learning Fund in Year 3*', DfES Research Report, No. 282, July, London: HMSO, File at: <http://www.dfes.gov.uk/research/datauploadfiles/RR282.doc>

Clough, B., (2004) 'From Spearholders to Stakeholders: The emerging role of union in the UK learning and skills system' in '*Trade Unions and Training: Issues and International Perspectives*' Ed, Cooney, R., and Stuart, M., National Key Centre in Industrial Relations Monograph

Cutter, J., Brass, J., Cowen, G., Dodd, M., and Turner, R. (2000) '*A Second Evaluation of the Union Learning Fund*', DfEE Research Report No. 208, July, London: HMSO, File at: <http://www.dfes.gov.uk/research/data/uploadfiles/RR208.doc>

Forrester, K., (2001) 'Modernising learning: an emerging lifelong agenda by British trade unions?' *Journal of Workplace Learning*, Vol 13 (7/8): 318-325.

Forrester, K., (2004) 'The quiet revolution'? Trade union learning and renewal strategies', *Work Employment and Society*, Vol 18 (3): 413-420.

Heyes, J., and Stuart, M., (1998) 'Bargaining for Skills: trade unions and training at the workplace' in *British Journal of Industrial Relations*, 36:3, September, 1998, pp459-467

Ross, P., (2000) '*What Works? MSF, Lifelong learning and the Learning Representative*', University of Leeds, School of Continuing Education, File at: <http://www.leeds.ac.uk/sce-online/cis/projects/pdfs/whatworks.pdf>

Shaw, N., (1999) *An Early Evaluation of the Union Learning Fund*, DfEE Research Report No 112, May

Shaw, N., Armistead, C., Rodger, J., and Hopwood, V., (2002) 'Evaluation of the Union Learning Fund Year 4', DfES Research Report No. 378, London: HMSO, File at: <http://www.dfes.gov.uk/research/data/uploadfiles/RR378.pdf>

TUC Learning Services (2003) *Promoting Learning Agreements*, File at: <http://www.learningservices.org.uk/national/learning-3381-f0.cfm>

Wallis, E., and Stuart, M., (2004) 'Trade Unions, Partnership and the Learning Agenda: Evidence from a Seven Country European Study' in '*Trade Unions and Training: Issues and International Perspectives*' Ed, Cooney, R., and Stuart, M., National Key Centre in Industrial Relations Monograph

York Consulting, TUC Learning Services (2003) *Union Learning Rep Survey*