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# Organising to learn and learning to organise

Three case studies on the effects of union-led workplace learning

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Unionlearn is the TUC organisation that supports union-led strategies on learning and skills. It helps unions to open up learning and skills opportunities for their members and also to develop trade union education for their representatives and officers.

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# Contents


Foreword	2
Abstract	3
Introduction	4
Background to the current emphasis on union-led learning	5
Evaluations of the Union Learning Fund	6
Outline of the research methods and case studies	8
The impact of unions on learning	10
The impact of learning on unions	17
Lessons from the three case studies	23
Concluding remarks	26
References	28

# Foreword

Union learning and organising agendas are becoming more integrated. Their learning strategies are not just about increasing opportunities for their individual members; they are also about renewing union activism and strengthening union voice, which in turn help to sustain their learning activities.

This research paper by the Scottish Centre for Employment Research examines the relationship between learning and union organising in three very different workplaces. The in-depth case studies demonstrate that union-led workplace learning can encompass work-related and non-work-related learning and that both types can benefit learners and their employers. They also show that union-led learning can have a positive effect on union organisation as a whole.

This paper, along with the research paper by the Working Lives Research Institute,<sup>1</sup> will make a valuable contribution to the ways in which unions integrate their learning and organising strategies.



**Liz Smith**

Director, unionlearn

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<sup>1</sup> Moore, S and Wood, H., *Union Learning and Union Recruitment and Organising*, Working Lives Research Institute. Unionlearn Research Paper 1 (2007)

# Abstract

Commissioned by the TUC, this paper presents original research by the Scottish Centre for Employment Research on union-led workplace learning. The research examines the relationship between learning and trade union organising at workplace level. It assesses how trade union organising contributes to worker learning and how that learning affects trade union organising. Based on qualitative research of three TUC-selected case studies, the research finds that for employees there can be provided additional learning and training previously absent from their employment. Three types of learning – for personal development, job-related, and to enhance employability – were presented, and there is evidence that union-led workplace learning can enable a ‘jobs escalator’. Learners can also progress up a ‘learning escalator’, starting with

learning that is not directly job-related to learning that is. In participating in learning, unions are able to offer an additional service to existing and prospective members, attitudes to unions are positively changed and recruitment is enhanced. Worker participation in learning can act as a graduating experience, providing a ‘roles escalator’ that encourages members to become union learning representatives (ULRs) who, in turn, graduate to other union representative positions. The establishment of the ULR role can therefore be supportive of, rather than at the expense of, more traditional union representation. Finally, there is evidence that learning can contribute to improved industrial relations. These benefits were not comprehensive across the case studies and there are issues that warrant further investigation.

# Introduction

Commissioned and funded by the TUC, this paper presents original research by the Scottish Centre for Employment Research on union-led workplace learning. This learning has recently been stimulated by the Union Learning Fund (ULF), but it has important lessons for union-led workplace learning beyond the ULF. More specifically, the research examines the relationship between learning and trade union organising at workplace level. It assesses how trade union organising contributes to worker learning and how that learning affects trade union organising. It also highlights lessons for trade union organising arising from union participation in that learning. The research, which was qualitative, was based on three TUC-selected case studies that were undertaken

during 2004 and 2005 in the financial, health and food processing industries in both public and private sectors. Three unions organised in each of these industries – Union1, Union2 and Union3 respectively.

The paper is divided into a number of sections. The first outlines the background to union-led learning and discusses evaluations of the ULF. The second describes the research methods and the three case studies. Subsequent sections present the research findings – the first examining how unions affect learning and the second how learning affects unions. The key points and lessons arising from these findings are then discussed, followed by some general concluding remarks.

# Background to the current emphasis on union-led learning

Recognising skill deficiencies and productivity gaps between the UK and competitor nations and responding to changes in work and employment, the UK Government has developed a national skills strategy. Basic skills have emerged as a key issue, along with the need to shift to an adult-orientated lifelong learning culture (see DFEE 1998, 2001; National Skills Task Force 2000; Symons 2004). It is recognised that trade unions can play a key role in promoting and helping implement government policy on learning and skills. The presence of unions encourages employers to invest in employees. Unionised workplaces are more likely to both offer training to employees and have training plans and training centres, as Perry et al. (1995), Cully et al. (1999) and Labour Force Survey (2003) all note.

Moreover, unions have long offered activist training for lay officers and also wider, accredited educational opportunities for these representatives as part of their 'career' development within the union. In some unions, there has also been a tradition of providing learning opportunities to members generally, for example, through the Workers Educational Association (WEA). Further interest in contributing to workplace training and 'working life education' was boosted from the early 1990s as some unions sought to become potential partners for management in improving skills in the workplace and/or to widen their appeal to prospective members (Payne 2001).

The Labour Government elected in 1997 sought to systematise unions' contribution to learning, training

and education with the establishment of the Union Learning Fund (ULF) in 1998. The explicit purpose of the ULF was to involve trade unions in the creation of a learning society. Money is provided to union-led projects to build capacity which encourages and enables learning that promotes employability and inclusion for individuals, and helps employers with productivity and competitiveness. Since 1998, nine rounds of funding have been announced, taking the ULF to 2007. During this time nearly 500 projects have been developed, more than 15,000 Union Learning Representative (ULR) roles were created and over 105,000 workers have been encouraged into learning.

Recognising the achievements of the ULF, unionlearn was established, with government support, in 2006. Providing a distinct branding for union-led workplace learning, unionlearn promotes and supports learning through unions and is intended to place learning at the centre of union activity.

The most obvious manifestation of capacity building has been the creation of ULRs, who have responsibility for facilitating learning through unions and whose functions have, since 2003, been underpinned in statute, giving them the same rights and protections as other workplace trade union representatives such as shop stewards. These ULRs are recognised by the DfES to be "in a unique position of trust and confidence in the workplace and... best placed to encourage those with basic skills needs to come forward" (DfES 2002: 2–3).

# Evaluations of the Union Learning Fund

The recent systematisation and funding of union-led workplace learning by the Government is being monitored by external organisations and the ULF has undergone regular formal, commissioned evaluations, principally by York Consulting Ltd. These evaluations tend to focus on the management of learning, learning outcomes and the type of learning and learners involved. The purpose is to assess the ULF's capacity to enhance learning and skills development in the workplace, and hence trade unions' contribution to furthering government policy and benefiting employers. Given that the fund is financed by government and requires the participation of employers, this evaluation focus is reasonable.

At the same time trade unions have to be aware of the ULF's effects on their own organisation and priorities against the backdrop of the decline in union density across British workplaces over the last two decades. Over this period, debates have emerged within the labour movement about alternative models or strategies of union activity that might help to regenerate trade unionism. Involvement in learning has been identified as a possible 'quiet revolution' that generates union renewal (see Sutherland and Rainbird 2000; Forrester 2004; contributions to Healy *et al.* 2004).

There are many ways in which involvement in learning might generate benefits for trade unions. Union officers and representatives may develop new skills and capabilities through their involvement in learning activities. Unions recognise the potential benefits of providing learning opportunities to members and non-members as part of wider attempts to improve recruitment, retention and activism (Rainbird 2000). For example, it has been suggested that ULFs can have a dual role, not just organising learning but revitalising union organisation by presenting a new face of unionism, aiding new member recruitment and representing a new type of activist (Calveley *et al.* 2003). Other benefits are possible for unions, ranging from bargaining advantages gained from representing higher skilled workers, through improved workplace industrial relations, to enhanced international labour

solidarity arising from improved skills in IT and/or languages. Part of the challenge for unions is in linking individual outcomes from learning with broader collective objectives (Shelley 2005).

There are, however, risks for unions in such involvement. Concerns have been raised over the dominance of employability issues – and a consequent narrowness of learning concerns – over the emphasis on employers' objectives in skills development, and over the acceptance by unions of learning responsibilities that might more appropriately fall to employers or the state (Forrester 2004). In addition, there are direct costs for unions in supporting learning activities and opportunity costs in not pursuing other union objectives.

To be effective, union-led workplace learning requires not only the development of learning capacity but also the ability of unions to develop that learning capacity. At the very least, the costs of participation (in terms of resources) should not outweigh the benefits of participation for unions. The ULF should therefore benefit trade unions, not just government and employers. A parallel emphasis then in any evaluation of the ULF and other union-led learning must be its effects on trade unions.

A small number of academic evaluations have sought to consider some aspects of the effect of learning on unions. Wood and Moore (2005) have considered the impact of the ULF on unions, employers and employees at workplace level, and have specifically considered its impact on trade union agendas and organisation. While both union officers and ULFs in their study perceived a link between learning activities and union organising, there was little reliable evidence as to how this had occurred in practice. Wood and Moore's ULF respondents were overwhelmingly existing representatives (78 per cent) rather than new activists. While the majority of ULFs were active in union recruitment among learners, only one-third of this group reported that membership had increased as a result of learning initiatives. Union learning was reported to have had positive outcomes in terms of workplace industrial relations.

No information was collected on changes in attitudes towards unions amongst learners or changes in levels of participation in union activities. More recently, Findlay *et al.* (2006) have analysed the impact of the Scottish Union Learning Fund (SULF) on all relevant stakeholders as part of a broad evaluation of all rounds of SULF to date, with a specific focus on the impact of involvement on union capacity.

Thus quantitative evaluations of the ULF have tended to focus on the extent of learning and the training of ULRs (see, for example, Antill *et al.* 2001; Armistead and Shaw 2003). Much less qualitative assessment has been undertaken and, overall, much less is known about the content and experience of learning and little analysis has been conducted on the impact of union-led workplace learning on trade union organisation (Forrester 2004). The research reported in this paper addresses these omissions. Using qualitative research methods and comprising three case studies, the research examines learning and trade union organising. It provides an indication of the operation, outcomes and potential for unions through union-led workplace learning.

# Outline of research methods and case studies

The research featured three case studies selected by the TUC's Learning and Skills Unit. These were perceived to be examples of successful trade union involvement in union-led workplace learning in terms of noticeably increased union membership and activism. Two case studies were ULF projects, while the third was intended as a ULF project but, following eligibility difficulties, was funded by the employer. Initial contact with the case studies was made by the TUC and the research team then negotiated access. The case studies encompass public and private sector organisations across England employing blue-collar, white-collar and professional workers: FinanceCo in the east of England (see case study 1); HealthOrg in a southern England NHS Trust, centred mainly on a single NHS hospital (see case study 2); and FoodCo in the north-west of England (see case study 3). The research was conducted in 2004 and 2005.

## Case study 1: FinanceCo

FinanceCo is a financial services company with 117,000 employees and distributors operating in around 50 countries worldwide. The UK and Ireland wholly-owned subsidiary operations of the foreign-based parent provide a range of insurance services. Independent financial advisors generate most of its business. It also has a direct sales workforce, appointed representatives and a direct marketing operation. The workplace learning initiative at the eastern England site is a pilot project that began in Spring 2003, with the aim of rolling out the policy at other company sites. There is a partnership agreement between the company and Union1 and a history of largely cooperative relations at the site.

## Case study 2: HealthOrg

As part of the UK's National Health Service, HealthOrg covers a wide geographical area in the south of England and comprises general practices, primary care and community health services. It commissions and provides local health care services and employs around 11,700 workers across a range of professional, white-collar and blue-collar occupations. Its services feature a number of health centres and hospitals, including the hospital that features in the case study. This hospital provides services for people with mental health problems. Within the hospital, the research focused on Union2 organised workers in ancillary services. Almost all of these workers were women. Historically, industrial relations have been cooperative at the site, with Union2 already offering learning opportunities through the WEA.

### Case study 3: FoodCo

This north-west England depot is run by FoodCo as a national return and recycling centre for a large supermarket chain. It has approximately 110 employees. All shop-floor employees are male and many are migrant workers. The company has a national agreement with Union3 and encourages employees to join the union. The learning initiative – Project Trident – was initiated by the depot manager and a Union3 steward in 2005 primarily as a way of addressing the English as a Second Language (ESOL) needs of many of the employees. Its success has led to further joint management/union learning initiatives being rolled out across the company.

The research methods were qualitative, with interviews and focus groups from each of the three participating unions. The various respondents were national or regional trade union officials responsible for union-led workplace learning, plant/firm level branch secretaries or similar, plant/firm level union ULRs and workplace learners. In addition, where possible, key relevant management was also interviewed, for example, the organisation's training manager. With the exception of the interviews with regional trade union officials, all research was undertaken in the case study workplaces and during working time. To provide anonymity for individuals, responses are unnamed. All participation was voluntary.

In relation to union-led workplace learning, the contextual data gathered covered the workplace/firm's previous and current industrial relations, the nature of workplace learning, the barriers and facilitators of workplace learning and the content of that learning. However, the main focus of the enquiry was the impact of union-led workplace learning on workplace/firm trade union organising, with particular emphasis on membership and activism.

The areas of examination were agreed with the TUC, with the material structured and presented thematically. The first findings section below opens with a short discussion of the organisational and industrial relations context of the three case studies as a basis for understanding the material that follows. After the contextualisation, the next section examines first how union organising contributes to learning and second how learning contributes to trade union organising. Following these findings sections, broader issues from across the case studies are raised, offering suggestions about how the potential for organising through learning might be further enhanced. The final section offers some concluding remarks on union-led workplace learning and its effect on unions, employees and employers.

# The impact of unions on learning

Largely through the ULF, unions are involved in encouraging and enabling workplace learning. However, different types of learning can be stimulated. After a brief outline of the organisational context of each case study, this section describes the characteristics of those benefiting from such learning, the types of learning being undertaken and their impact.

## The learning initiatives in organisational and industrial relations contexts

The organisational contexts of the case studies were very different, ranging from white-collar workers in the private sector to unskilled manual workers in the health service and warehousing/recycling. They were similar, however, in terms of the existence of a favourable industrial relations context, without which learning initiatives are much less likely to succeed. Further, continuing management support was beneficial to the sustainability of these initiatives. Positive experiences of formal or informal partnership predisposed these employers to see opportunities for further mutual gains. For example, the FinanceCo employee relations manager stated that the purpose of the new learning initiatives was “to assist union members because we work closely and in partnership with the unions – we wanted to do it wider”.

In the NHS case, both union and management described employee relations as good before the introduction of the learning agenda. With specific reference to training, Union2 had provided training courses for members in the past, but union-led workplace learning has enabled a co-operative approach with management on the basis of mutual gains. The reasons for that managerial support are not hard to discern: “If people are given a basic right of education and are helped and supported, it produces a better workforce... There’s less sickness, less discontent, less people moving on,” claimed Union2’s branch secretary.

At FoodCo there is a national agreement between the company and Union3 and the previous experiences

of local management at the depot predisposed management to encourage union membership as a stabilising factor and to take measures to offset the high labour turnover, low skill base and poor industrial relations characteristic of some parts of the sector. A similarly positive attitude from the key union activist on site enabled a local partnership through which company and union were ‘singing from the same hymn sheet’ on most issues. “I don’t want to just be talking to the union about pay and problems: I want to be talking to them about developing our colleagues,” said FoodCo’s depot manager.

Management’s reasons for participating in union learning varied across the case studies. In the NHS case, the training and development manager was keen to use union-led workplace learning to effect a cultural shift to a more inclusive learning agenda, moving beyond that already provided for an already “well educated workforce” (typified by healthcare professionals) to encompass unqualified workers with “basic learning problems”. At FinanceCo, the learning initiative was seen as part of a wider partnership agreement and the need for a learning culture. The partnership agreement required Union1 and the company to identify a group of ULRs and begin a learning needs analysis on the site. The ULF was used as a framework to engage with local college providers to offer non-work-related classes.

At FoodCo the impetus for learning came from migrant workers’ language problems, specifically in communicating with drivers and dealing with health and safety issues, and the impact of those problems on performance. Language capability was therefore seen as central to improving all-round skills:

*“Somebody might be really good at their job but if they can’t speak the language you can hardly expect them to be promoted when you can’t understand what they are saying. (FoodCo union steward)”*

Though originally conceived of as a ULF initiative, problems with accessing local learning provision led to FoodCo taking on the costs of learning (see Problems

and issues, page 15). Overall, the opportunities for the development of a learning agenda appeared to be strong in all case studies though, as we indicate later, the content with respect to work and non-work related initiatives differed considerably.

## The learners

All the learners participating in the NHS case worked in hospital domestic services. They were predominantly women, all were over 40 with children and all had left school at the statutory minimum age. At FinanceCo, most of the socially diverse group of learners in this white-collar environment had acquired qualifications and received training. At FoodCo, most of the small group of learners were male migrant workers who had no prior post-school experience, but all were keen to embrace new learning opportunities.

For many of the workers in the case studies, learning beyond statutory induction training had never featured as part of their job:

*“You went on an induction when I started and that was it. Then they just chucked you on the ward and left you there.” (NHS learner)*

*“You were just a cleaner. What skills did you need? You push a Hoover, use a mop, get on with it.” (NHS learner)*

*“It literally was: ‘Get on with it.’ (NHS learner)*

There was some variation in attitudes to learning held by workers and how these attitudes linked to motivations for undertaking further personal development and lifelong learning.

*“Once I’d left school, for me that was it. I didn’t know that I could go back to college and learn what I wanted to learn.” (NHS learner)*

*“For me, I’ve always been interested in it [learning] but I never thought I could do it on my own. I didn’t know where I could go to do it or if I was brainy enough to do it.” (NHS learner)*

Some of the learners at FinanceCo shared a similar experience:

*“I was never ready to do anything like that when I was younger... so I’ve got a bit older; I’m ready to learn now, you know.” (FinanceCo learner)*

## Types of learning undertaken

Three types of learning are possible through union-led workplace learning: that for personal development; that which is job-related; and, bridging both, that which enhances employability. Evidence of all were found in the case studies, including job-specific National Vocational Qualifications (NVQs), returning to learn/learning improvement classes, literacy and numeracy classes, Spanish, English as a Second or Other Language (ESOL), driving lessons, assertiveness training, and minute-taking classes.

In the NHS case study there was evidence for opportunities for each of the three types of learning. This was helped by the maintenance of Individual Learning Accounts (ILAs) in the Health Service. The union collectivised these entitlements to create economies of scale so that groups of workers could be sent on courses for which there is demand: “That’s been quite a leverage for us with Union2 to highlight people to access learning,” explained a Union2 ULR. The ability to use ILAs, and to use them to encompass a wide range of learning activities, was emphasised by the NHS training and development manager, who explained:

*“The principal function... is to encourage people to get back into learning and so, while there are requirements which say this should be part of your personal development, if they come along and say to us they want to do this language or whatever, we will say: This is part of your personal development – anything that they can do which will enable people to extend their ability, their knowledge, their understanding.”*

At FinanceCo, the company was clear that the kinds of learning offered would not be directly work-related

and would be separate from existing company training opportunities. Such opportunities fitted the orientations of learners, who were looking for “something to get the brain going ... something totally different” (FinanceCo learner). Potential learners (union and non-union members) were offered a variety of courses, some on and some off-site. Languages were among the most popular offerings, but other examples included art. “I did the Spanish course – my parents have just moved to Spain so I thought it would be good to speak the language” (FinanceCo learner).

At FoodCo such learning was cast as work-related. As indicated earlier, there were significant language problems among migrant workers, resulting in an emphasis on the provision of ESOL courses. Such basic skills issues exist in the sector beyond the company featured in the case study and are particular areas of interest for Union3: “We are promoting literacy and numeracy very heavily at the moment among members, many of whom are low paid and low skilled,” explained Union3’s regional organiser.

## **Additionality**

A key issue with the ULF is whether or not union-led workplace learning initiatives substitute for learning that is, or should be, provided by employers rather than filling an important gap in provision that might not normally be provided by them.

There was clear evidence of additionality in the NHS and FinanceCo cases; the FoodCo case was ambiguous in that what began as extra provision was eventually paid for by the company and incorporated into its overall provision. In this case, the union was able to encourage management to support and fund learning that had previously been absent but which might be regarded, at the very least, as being beneficial to the company. This type of approach is one that union-led workplace learning will require if it is to be sustained beyond the ULF.<sup>2</sup>

NHS workers reported that in the past they “had to really fight to get on a course” and often gave up asking management. The union learning agenda now, however, “makes it [learning] more accessible”. Many of these workers had left school early, had been overlooked for training by management and believed themselves not to be college material. They thought they were unable to undertake learning, and management thought they didn’t need it. Now that they are undertaking job-related training, for example NVQ Level 1 Cleaning, they are proud of their achievements.

Given that the learning initiatives at FinanceCo were largely extraneous to direct work needs, they were not substituting for existing provision. However, the attractiveness of the initiatives to some interviewees partly reflected the limitations to what the company describes as ‘professional development’ in the call centre areas: “Unless they want you to do other products and that’s when your training begins – but that’s not always the best training, you know,” a FinanceCo learner commented. Union-led workplace learning therefore offered opportunities at FinanceCo that were of a different kind to that provided by the company.

## **Benefits for learners and employers**

Union-led workplace learning can encompass both work-related and non-work-related learning. Both types of learning can benefit workers and their employers. For some learners and some types of learning, the boundary between work and life-related benefits can be fluid. Similarly, some of the benefits to employers accrue whatever the type of learning undertaken. The next two subsections examine the benefits to learners and their employers.

### **Benefits for learners**

Benefits for learners ranged from improved personal skills (such as improved confidence or communications skills) to direct job-related

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<sup>2</sup> See the evaluation of the Scottish Union Learning Fund and subsequent recommendations by Findlay *et al.* (2006).

skills, with the enhancing of employability a bridge between the two.

*“They’ve identified some needs they want to address, like somebody who has not used computers before and wants to do a basic computing course. Some people use it to move on in jobs and promotion. Some people do it for confidence or assertive skills... We’ve got women who are quite timid and shy who have done assertiveness courses and things like that and that’s made a difference to their lives both at work and at home. They’ve done that course, really enjoyed it and have looked at doing other courses as well.” (NHS ULR)*

*“I would not have thought that I could do a psychology course being a domestic [worker]. It doesn’t involve my job, although it does to a certain extent because we are based on the wards... It helps you understand how they [the patients] are and why they’re there.” (NHS learner)*

Learners at FoodCo were partly motivated by the same factors as management – to be able to talk to drivers, colleagues and management more effectively. But all said that the course enabled them to communicate better with the outside world. In the NHS, a ‘jobs escalator’ has been created, starting with re-entry to learning and ending with staff gaining promotion within the organisation:

*“What it does is open up opportunities for people and one of the things we’ve been able to do is encourage people from all sorts of backgrounds, mostly health care support workers. They’ve done the NVQ and then we’ve been able to sponsor them into some pre-registration nurse training and get them through that qualification as well.” (NHS training and development manager)*

*“It’s human nature. You look at somebody else’s job and think: ‘Oh I could do that’ and then you think: ‘Wait a minute, perhaps I’ve got some of the knowledge and the skills, but I haven’t got the*

*qualifications that I need to get me there’ – and that’s why they have to come to you.” (Union2 branch secretary)*

These issues were very much to the fore in circumstances where job demands were changing. In the NHS case, the imminent Agenda for Change, with its reconfiguring of NHS job descriptions and pay banding, also featured as an important recruitment driver according to Union2 ULRs. They suggested that union-led workplace learning can and should feature in the Agenda for Change as it offers a potential ‘upskilling’ initiative for workers, necessitating training at all grades.

Although there is no evidence of a jobs escalator at FoodCo, ESOL and basic skills learning did enable employees to graduate to formal job training with accreditation, thereby increasing their employability both within and outside FoodCo: “If you’re able to write a good CV then you can get employment in other places,” one learner at FoodCo pointed out. This situation was not one feared by management, for they too benefited: FoodCo’s depot manager insisted that employees can “get their teeth into things like NVQs in Warehousing... I want to create a situation here so that people are coming to us saying we can develop their career”. Learning initiatives have also helped to facilitate promotion opportunities for three ethnic minority charge-hands, enabling company and union to deliver on diversity and equality objectives.

Enhanced employability was also a factor at FinanceCo and FoodCo. At the former, there were concerns about the nature and stability of employment, particularly in the call centre areas. As one FinanceCo learner explained: “People want to change careers as well and they felt [learning] can help them get the experience that they need to change their career and get out of the job that they really, really hate.”

## Benefits for employers

Learning generated a variety of direct and indirect benefits to employers. In the NHS, learning activity was linked to improved staff retention and thus to facilitating an important organisational objective:

*“It’s to their advantage to work with us... Very often it’s not easy for staff to go to speak to management if they want to do something, or they find that they are going to be blocked and they will just say: ‘Well I’ll leave and I’ll go and work in Tesco,’ or whatever. If you’ve got happy staff and they are being allowed to do courses, they are not going to walk away and look for another job.”*  
(Union2 branch secretary)

There was evidence that learning which is not directly work-related can also generate benefits for employers. At FinanceCo, learning included Spanish and art classes during working time, which compensated in part for the monotonous work and increased employees’ job capacities. “I think you definitely need that, especially [when you’re] working in a call centre, which isn’t the most interesting of jobs,” said one FinanceCo learner. Another commented: “I think in a way it recharges your batteries a little, gives you a bit of confidence.”

There is evidence in the NHS and FoodCo of an emerging ‘learning escalator’ for non-traditional learners in which non-work-related learning can develop into work-related learning or learning that increases employees’ job capacities. This illustrates the benefits to employers of investing in employee learning.

*“As far as we’re concerned it’s about getting people into learning with the expectation or the hope that once they’ve done one thing, they’ll develop some competencies and do other things.”*  
(NHS training and development manager)

*“One of the biggest things we’ve said all along is look at the potential you’ve got within your workforce and build on it; we can help you do that.”*  
(Union2 branch secretary)

In all cases, management regarded participation as enabling the organisation to be seen by its employees as a ‘good employer’.

*“I think as an organisation we do want to promote learning because that can only be good. I think if you can get people learning – and it doesn’t have to be work-related – we could inspire people to progress within the company.”*  
(FinanceCo employee relations manager)

Benefits included the promotion of learning to other stakeholders. At FoodCo, efforts were made to disseminate information about learning initiatives to senior managers within FoodCo and outside the organisation to customers, with positive outcomes: “The customer came to the presentations and they were over the moon that we were trying to do these kinds of things,” said FoodCo’s depot manager.

Recognising the benefits of complementary efforts, in the NHS the union and management were now working together with the Trust’s department providing mandatory training and Union2 providing lifelong learning-type courses:

*“They [the training department] say: ‘Right what courses have we [Union2] got available, what course are you going to put on?’ And we give them a list for the courses, especially Union2 courses like the WEA ‘counselling skills’ and ‘return to learn’. They are now starting to link in with us... We are much more up there, discussing things with them about training. We’re there so they want to work with us. They often say to me: ‘I think it’s wonderful what you’re doing.’”*  
(Union2 branch secretary)

*“The training department is now coming to us to fill courses. They don’t always advertise courses very well... Now that we’ve got a good relationship with them, lots more people are aware of what training is available and they can come to us if they have any queries.”*  
(ULR)

## Problems and issues

There are some, often very practical, limits to developing learning capacity. ULRs recognised that not all workers have been (or can be) attracted to learning. One FinanceCo learner commented: “You have got people who have been here for donkey’s years and you know that they are never going to have any interest in learning because they are just waiting until they retire.” A further factor is the difficulty of identifying diverse learning needs on non-work subjects. This may explain why follow-up efforts by representatives at FinanceCo were reaching a relatively small number of people: “I did one circular that was sent out to 1,300 and I got 15 back,” commented the FinanceCo ULR.

There have also been problems in accessing the right kind of learning provision. To address the language problem at FoodCo, the depot manager and union steward intended to use ULF money to finance ESOL classes. They approached a local college, but found barriers in the type of provision available and rules that prevented the ULF being used to support the needs of migrant workers who did not meet three-year UK residency criteria. The Union3 union steward explained: “We were doing it every way we could think of but half our guys didn’t qualify or if they did qualify there was something wrong with accessing the money. We had tremendous problems with providers.” In these circumstances, the depot manager persuaded FoodCo to fund an internal ESOL certificate and brought in a tutor. “That’s where people were asking: ‘Are you actually going to go ahead with this?’ and I said: ‘Yes, I’m not giving up now’, so I raised a cheque from the company for £3,500” (FoodCo depot manager).

The most likely barrier to the development of successful learning was entrenched management attitudes. This problem in these case studies was, however, confined to a small minority of managers. As might be expected, in both the FinanceCo and NHS case studies, human resources and related professionals were generally positively engaged

with learning initiatives. Referring to the FinanceCo employee relations manager, a ULR said: “She’s been really supportive, but other management aren’t necessarily as supportive as maybe they could be.” A colleague contrasted that experience with others:

*“You have some team leaders who are extremely experienced and are used to dealing with a union and some that aren’t and it just doesn’t always filter down. I think a lot depends on who your management is. I think the management from the top seem to have a lot better attitude... Some of your team leaders, some of your middle management... they don’t seem to show any interest at all really.” (FinanceCo ULR)*

The strong alliance between depot manager and ULR at FoodCo was supported at higher levels in the company and reinforced by the success of the initiative. Union3 learning project officers were generally positive about support from employers but found that, lower down the hierarchy, attitudes varied among managers and training departments. The Union3 project officer reflected: “Some of the managers were not on board with lifelong learning. You always get that. It all comes down to the manager on site, I reckon.”

Managerial obstruction is often more to do with work pressures than ideology and so, unsurprisingly, it is line managers with whom most difficulty is experienced: “At the moment I’m struggling to take my union time because our department is busy,” stated the FinanceCo ULR. In the NHS case, line managers stated that financial constraints, workload pressures and staffing shortages disabled learning. Whether pragmatic or ideological, the solutions across the cases were similar: “You just have to slap the partnership agreement in front of them,” said the FinanceCo ULR. Similarly forthright, the NHS Union2 branch secretary sometimes had the same experience:

*“You do sometimes get some who say, ‘I’m the manager’ and, you know, I think those days are gone. [We have to say] ‘I’m sorry we don’t accept*

*that any more. You might be the manager, I know you've got a job to do but you need to look at your staff.' And that is part of the whole learning agenda..." (Branch secretary)*

In extreme cases, unions have threatened to invoke grievance action against line managers. "I don't mince my words," Union2's branch secretary stated. "I usually just say: 'Well that's fine, we've spoken to you, I can take it higher, you are trying to block this.' The managers then re-assess the situation and comply."

## **Organising for successful learning**

It is clear that unions can contribute significantly to developing and delivering workplace learning, particularly for those workers previously overlooked or reluctant to undertake training and whom government wishes to target. Workers with basic skills difficulties are helped when previously they stayed silent. As the NHS Union2 branch secretary stated: "We talk to everybody but... very often they're frightened. They would like to do it but they use an excuse and then I'll say: 'Well, come in for a chat, there are various things you can do.'"

Because of residual negative perceptions held by some older workers with regard to trade unions, ULRs provide an alternative and immediate point of contact and support that is highly regarded:

*"They [workers] are not always comfortable going to trade unions' departments or managers but they'll come to learning reps because they feel that whatever happens we're on their side. We are kind of batting for them if they want to do training."*  
(Union2 branch secretary)

The evidence presented here therefore demonstrates that union organisation can have a positive effect on the enhancement of learning in the workplace. However, for unions there is also the issue of whether or not learning enhances organisation and, in particular, if participation makes the union more attractive, active and able.

# The impact of learning on unions

There are a number of ways in which the ULF and related learning initiatives can affect trade union organisation. They can: be offered as new, beneficial services, aimed at changing attitudes to the role and purpose of unions; attract new members; and encourage greater participation and activism. Each of these possibilities is now assessed.

## Learning as a union service

Learners were overwhelmingly positive about the learning agenda and saw it as a new and welcome development on the part of trade unions.

*“I was surprised it was coming from a union... The opportunity to do something totally away from the sort of training that I do at work was really nice.”*  
(FinanceCo learner)

*“The course was brilliant. I could not speak good English at all... The course was very positive.”*  
(FoodCo learner)

*“Up until the day [the learning rep] came down with everything... as far as we were concerned we were here as domestics, period. There was nothing to say that you could improve your working skills.”*  
(NHS learner)

*“They all say now: ‘Oh, I’d like to do that. I’ll ask [the learning rep].’”* (NHS learner)

## Attitudes to unions as a consequence of union-led workplace learning

Prior to the introduction of the ULF and union-led workplace learning, many of the case study employees had negative attitudes to unions based on historical perceptions: “My perception of shop stewards is strikes and things like that and working against managers,” said one Union2 ULR. Such attitudes were also held by other respondents:

*“Years ago I thought they were a pain in the neck because they led the miners’ strike or the bloody electrics not being on. I thought ‘Bleedin’ unions’. That was my view [before]... that they were a pain in the neck.”* (NHS learner)

Some employees had more benign, if instrumental, attitudes towards unions, especially if their parents had been union members: “We thought the union was to help you if you were in trouble with work,” said one NHS learner. At FoodCo, migrant workers generally had no prior experience of trade unions. The absence of preconceptions about unions and the fact that the ESOL course was such an integral part of their work experience meant that they were less likely to regard union involvement in learning as unusual.

Although Union2 has been recognised at HealthOrg since its establishment as a union, workers felt neglected and the local branch was in decline. It was only with the introduction of the learning agenda that these workers became aware of both the union and the benefit it could offer them. “When I first worked here... I never knew there was a union office,” one NHS learner commented. Another stated: “There was no union. We didn’t know that we had one. We never saw a union member or even know about one.”

There was a strong indication, however, that the learning agenda is creating more positive perceptions of unions among employees and existing members. New and existing members were enthusiastic about the promotion of the learning agenda:

*“It’s only in the past couple of years, though, that this learning thing has come about. It wasn’t really there before – I’d never heard of it until that point when they [the learning reps] came down.”* (NHS learner)

Learners at FoodCo were happy to join the union and their experience of the ESOL course reinforced an already positive view of unions in the workplace: “The union is very good... They provide information and talk with us if we have problems,” said one FoodCo learner. Exposure to union learning initiatives can also make workers rethink the wider role and importance of unions in the workplace:

*“It has opened my eyes. I never realised that the unions do as much as they do.”* (NHS learner)

*“It makes you wonder if management would be quite so good if we didn’t have the unions.”  
(NHS learner)*

*“I think because the unions are for us, they [management] do co-operate a little bit more.”  
(NHS learner)*

### **Union recruitment and activism**

Although at FinanceCo the majority of workers had joined the union prior to the learning initiative for standard job-related reasons, the initiative still boosted recruitment. One FinanceCo learner outlined his experience: “They were doing a recruitment drive... You join the union and the learning scheme, and it was quite a bit of a bonus for me.” There is, however, tangible evidence from the NHS case study that the learning agenda had a more dramatic effect on union membership. In 2003 the branch had 1,800 members: this rose to 2,800 in 2004.

*“Those members who we’ve helped to do courses have gone back to their workplaces and said how Union2 has helped them.” (ULR)*

*“People always used to say: ‘I don’t want to join a union – they are troublemakers and just want to go in and argue’. We have to turn them around, and I think results speak. People come up to me and say: ‘We’ve heard so much about what you’re doing. It’s just wonderful.’ We’ve recruited very, very well in the last six to nine months because of the learning side.” (Union2 branch secretary)*

There is little direct evidence of union recruitment as a result of the learning initiative in the smaller site at FoodCo. However, across the industries covered by Union3, there is evidence that in larger workplaces membership has increased as a consequence of union-led workplace learning:

*“For the union it’s our biggest recruitment tool now. [Our members] have got better skills... transferable skills and we’ve had a lot of our members promoted to higher jobs. It’s made it another arm to negotiate for the union. I think it’s given the union more profile.” (Union3 project officer)*

At FoodCo, learners had already been recruited to the union at induction. However, the learning agenda does offer a new opportunity and reason for the ULR to meet union and non-union members: “The fact that I don’t distinguish between union colleagues and non-union colleagues gives me the opportunity to get out there and talk to everyone,” said the ULR

The link between the activities of ULRs and union recruitment was clearly visible in the NHS case study. Here, good practice involved encouraging the recruitment and training of more ULRs to work directly with workers to promote the learning agenda, and supporting the learning of non-members: “It’s a case of not turning people away, still talking to them, giving them advice, giving them the support they need and 99 per cent of the time they’ll come back to you,” explained the Union2 branch secretary. This opening enabled the benefits of union membership to be appreciated: “We say to them: ‘If you’re not a member there are only certain things that we can do for you. If you were a member we could do a lot more’,” she continued. Members recruited through union-led workplace learning then recommended the union to other workers and their awareness and appreciation of what the union can offer and do for workers was raised. New union recruits and ULRs attracted through union-led workplace learning suggested that the union should more heavily promote learning as a service of the union as a way of attracting new members:

*“A union to me is, or was, someone who is going to defend me if I need them, it’s not really about the learning side of it... So you need to promote that side more to the younger people and others.”  
(NHS learner)*

*“This is the future of the union because the union can always sort out disputes and things, but they will never survive purely on that alone.”  
(FinanceCo ULR)*

There are a number of ways in which involvement in learning can impact on union activism: through the recruitment of new members as indicated above; through the increased involvement in union activity

of existing members; and, crucially, through the recruitment and activities of ULRs. For example, Union1 in FinanceCo found that it was relatively easy to identify and recruit new ULRs among workers who had not previously been union activists of any kind.

### ULRs and organising capacity

Recent legislation that has formalised recognition and the rights of ULRs has helped their role. ULRs now have facility time to determine the learning needs of members and then organise that learning. Union learning activities enabled new members to move quickly into representational roles. This increased activism typically involves workers characteristic of the workplace – a predominance of one gender, for example. In the NHS case, activism has increased, with new members becoming ULRs. Significantly, many of these new recruits are younger workers in their twenties. This enthusiasm was particularly pleasing for Union2's branch secretary in the NHS:

*“You’ve got people like domestics becoming learning reps, health and care support workers. We’ve even got a management secretary who is continually calling me up to say: ‘When can I become a learning rep?’... The learning rep is a very attractive position in the union because a lot of people see it as a nice easy way of being involved but not with too much hassle.”*

While the initiatives at FoodCo were in their early stages, in Union3 there is evidence that a new layer of activists is being drawn into new roles: “We’ve got a lot of learning reps who don’t have a union background; we see it as a way of getting more union activists within workplaces,” the Union3 regional project co-ordinator noted. It should be remembered that ULRs are often double learners, undertaking both ULR training and other job-related or non-job-related learning. The experience of representatives of courses provided by the TUC was overwhelmingly positive: “I didn’t want to come back [laughs]; it was absolutely brilliant, and set up really well,” recalled the FinanceCo ULR. Though the ULR at FoodCo considered himself to be “well educated” and had a background in further

education and social work, he too found the course beneficial: “The interesting thing about all the courses I’ve done with the trade union was meeting other reps, hearing how other people operate, how other firms operate and the kind of horror stories they come out with.” In the NHS case study, members clamoured to be sent on the ULR courses and there was a waiting list operating. At FinanceCo all ULRs were new to union activism and national officers believed this to be true more generally.

*“Generally speaking, we are attracting a whole new layer of people into activity who wouldn’t have been active before, or have certainly shown no interest in being active, because of the learning role.” (Union1 regional learning projects coordinator)*

Part of the attraction for new activists in becoming ULRs appears to be the difference in this role from conventional representational roles such as that of shop stewards. There is evidence that some members are drawn to the ULR role, believing it to involve less confrontation. As Union3's regional project worker explained: “When you’ve got to deal with grievances and stuff like that, some people couldn’t handle it. Some people are good at one thing and bad in others.” More generally, escalating activism helped bypass traditional attitudes towards union involvement by providing new members with tangible and positive experiences of union work:

*“If you go out and try and recruit activists – say a steward – they’ll say: ‘How much do I get paid?’ And you will say: ‘Nothing’. They say: ‘What? You do all that for nothing? I don’t want to know.’ But when people are led into it through the learning they see the benefits for themselves and they get a thirst, saying: ‘I want to go on and do a bit more. I want to help other people.’ And they actually see that they are part of a big family.” (Union2 branch secretary)*

There was evidence of ULRs going on to take up other, broader representational roles. This suggests that a union ‘roles escalator’ is being created through union-

led workplace learning, especially in the NHS case, where non-members became union members, then learning representatives, then stewards or health and safety representatives. The experience of union-led workplace learning acted as a positive lever to affect workers' perceptions and experience of the union, the range of work undertaken by the union and their activism within it. It also enabled the development of generic representational skills:

*“Once they’ve been a learning rep and gained confidence dealing with members and dealing with managers, [they have] that little bit more confidence to then go on and become more active.” (Union2 branch secretary)*

*“They’ll start off and do a little bit of work and they find that they quite enjoy it and they want that little bit more. That’s when they’ll say: ‘I’d like to become a learning rep.’ Then they’ll become a learning rep, get a little bit of confidence ... get a little bit of practice ... under their belt and deal with members and they will say: ‘I feel confident now.’” (Union2 branch secretary)*

*“The ones that have become learning reps, six months down the line... they’ll say: ‘I want to become more involved in the union now’ because they weren’t aware of just what the union does. They don’t see all the different things, they just see it as: ‘I’m never going to get into trouble so why should I become a member and get involved?’ But once they become involved I think they see the benefits and feel themselves better for it.” (Union2 branch secretary)*

Being a ULR indicated new members' growing commitment to and activism in the union through the learning agenda. “The learning culture has improved considerably and it’s opened up more opportunities for wider work roles,” said one of the NHS ULRs, adding: “I think it’s also opened people’s eyes to what unions are doing.” New activists’ relative inexperience can be addressed through the pooling of expertise. At FinanceCo, a team of learning representatives was established that met regularly to exchange ideas and experiences.

## Support from the union

As a new representational role, and one that is still developing, there is a potential for ULRs to be isolated from other union activities and activists. Assimilating ULRs and their role into wider union structures is crucial. This point was expressed by Union3’s regional project co-ordinator at FoodCo:

*“In some places it causes a problem because we get a group of learning reps that is quite distinct from the rest of the union. In some cases the communication between the two isn’t great and they operate almost separately.”*

There was clear evidence across the case studies of appropriate support for ULRs from the three unions. Support from the union was described as “great” by the representative at FoodCo. He was particularly impressed by the range of facilities offered, a theme also picked up by the depot manager: “In Union3 they’ve got a lot of facilities that we are not tapping into as a company. They’ve got lots of departments that are into training, development, education.” In the NHS case, links between ULRs and the local and regional union were strong. Learning agenda activities were firmly bolted on to the local union activities and organisation, and regional support was strong. The regional field project worker charged with promoting learning within the union was a frequent visitor to HealthOrg, attending branch education team meetings. The regional officer also helped the branch with ‘roadshows’, taking the learning initiative to other hospitals:

*“She has led the way for us – opened up a lot of doors, told us where to go for things; she is very supportive. If we are having perhaps somebody who is quite difficult and quite obstructive as well, she is more than happy to come down and help us.” (Union2 branch secretary)*

At FinanceCo, the learning agenda was supported by FinanceCo-specific organisers (two ‘seconded representatives’), as well as the national Union1 learning co-ordinator, regional learning representatives and their centres. There was regular contact with the seconded representatives. That may, however, not

always be typical of the broader situation. A Union1 learning projects co-ordinator commented that: “The problem is that not all union organisers are of the view that the learning agenda is a good thing that they should be focusing a lot of resources on.”

Even from the early stages of the implementation of the learning agenda, there was evidence of its contribution to improved industrial relations. In the NHS case, respondents indicated that relations had improved because of it: “The relationship has been supported and helped by [union-led workplace learning] rather than fundamentally changed,” the training and development manager stated. “It’s very much a partnership between the employees and the employers and the union,” said one ULR. Management support for union-led workplace learning was overt and active, and such learning has consolidated the existing co-operation between unions and management. According to the branch secretary: “They are usually very helpful. They appreciate what we do ... they really do work with us.” Furthermore, success with the learning agenda in the NHS case has meant that the local branch has been able to negotiate for more facility time for lay officials paid for by the employer. That union-led workplace learning should be suggested as extending into other negotiated arrangements involving unions highlights both its future potential contribution to broader union activities and its current positive reception.

## Problems and issues

Given that the role of ULR is a relatively new one, it is not surprising that there are a number of problems associated with it. These problems centre on the supply of ULRs, ULR roles and, in some cases, their workload. Being a ULR requires certain types of skills and attributes, and the preparedness of potential ULRs can be an issue. According to ULRs, learning representatives have:

*“...to be a good communicator, good listener, good adviser – someone who offers good, impartial advice.” (NHS ULR)*

*“...to have confidence, knowledge, empathy and an ability to talk to people...” (NHS ULR)*

Additional difficulties have been experienced where newly recruited ULRs have not been adequately briefed on role expectations:

*“Initially we had the training set up and the union did a really good job getting people to be union learning reps. But for these first half dozen people it was really like putting the toe in the water – they didn’t quite understand what was going to be involved in being a union learning rep.” (FinanceCo employee relations manager)*

Given the issues raised above, unions need to think carefully about recruitment and selection into what is a distinctive and demanding role. “I don’t think any course could actually prepare people for that. I think it’s more about getting the right type of person,” said the FinanceCo ULR. Of course, being able to engage potential ULRs is dependent on there being a ready supply of willing individuals. The role escalator is sustainable only if there is a ready supply of new union members. This supply is evident in the NHS case, with the branch both passively receiving and actively recruiting new members because of union-led workplace learning. With a large and eager workforce, this situation is unlikely to change in the short-term. Where the pool of potential representatives is small (for example, in small workplaces or where membership density is low), problems have arisen in relation to role overload and role overlap, with the two often intertwined.

A number of learners at FoodCo indicated that they might consider becoming a ULR in future but the existing ULR had concerns about their capacity to handle the role: “I’m in the process of deciding whether they deserve to have [the role] inflicted on them and whether they can actually handle it.” There is a tendency in some workplaces for ULRs to hold a number of representative roles, a practice that can be problematic. Role multiplicity caused time-squeeze problems at FoodCo; the ULR ironically described it in terms of multi-tasking: “I’m the union rep, the union

learning rep, the union health and safety rep. I also happen to be a charge hand, so I'd say that my days are well filled."

Where there is a less certain supply of potential ULRs, there may be a problem for unions in avoiding the best activists automatically 'graduating' to more conventional union roles and thereby undermining union capacity to encourage and enable workplace learning – a factor that impacts on the sustainability of union learning initiatives. This had been a problem at FinanceCo. While role overload can be a problem, some perceived role overlap can also be beneficial, with representatives able to move seamlessly between functions as members need. "There are people that know that we do the learning, but not everyone does that," said one working in the NHS. His colleague added: "I would say that most of them, like the branch officers, just think of it as part and parcel of being a steward and a learning rep."

However, some ULRs felt that it was necessary to make a clear distinction between different sets of activities because otherwise the promotion of learning and the reach to members and potential members is hindered. "We get very much associated with the other side of union reps, which is to deal with problems and issues, whereas we're [here] to deal with the nice stuff, the learning," said the FinanceCo ULR. Such distinctions are particularly difficult to maintain when the roles of union and learning representatives are combined in the same person, as at FoodCo.

Whatever difficulties were encountered in undertaking the new role of ULR and integrating it within broader union activities, activists were optimistic about the status of the learning agenda within the union movement. As the FinanceCo ULR said: "I think give it a couple of years and we will have the same treatment – we will have the same sort of respect as union reps." In terms of sustaining union-led workplace learning, respondents said there was a need to identify and diffuse successful local examples across their respective organisations and unions, and even to other local industries. Key players at FoodCo recognised

the role of a successful example to promote learning initiatives across the company. The Union2 branch officers at HealthOrg believed that the union should promote the learning agenda more widely in branches by the sharing of best practice as a means of raising the profile of the union, recruiting more members and increasing activism.

There is little doubt that, in each of our three cases, additional union capacity (in the form of new members, new activists and new representatives with important training and skills) has been created through involvement in union-led workplace learning. These outcomes were of considerable benefit to unions, not only in relation to their learning activities, but also in promoting and sustaining unions themselves.

# Lessons from the three case studies

The three cases studies examined in this paper were all identified by the TUC as success stories. They reveal that not only has union-led workplace learning clear, positive and recognised effects for existing and potential union members, but it also has clear, positive and increasingly recognised effects on union organisation.

While it is important for unions to maintain their traditional role of defending jobs – there were concerns at FinanceCo about jobs being off-shored and in the NHS about job re-grading with the Agenda for Change, for example – potential and existing members welcomed union-led workplace learning and unions' participation in it brings benefits to those unions. While our research confirms the case studies' successes, a range of issues did emerge concerning the diversity, character and sustainability of the practices that may have wider resonance beyond these case studies.

For employees, union-led workplace learning can provide additional learning and training previously absent (in some cases for many years) from their employment. This is particularly true for non-traditional learners but provision also meets the learning interests of other employees who may have missed previous opportunities to learn but now feel ready and able to participate.

Not surprisingly, the three types of possible learning – for personal development, job-related and to enhance general employability – were evident and welcomed by learners, and fitted learners' circumstances and needs. Moreover, learners were aware of the potential job and career-related benefits of learning, as well as more general personal development outcomes. There was some evidence from the NHS case study that union-led workplace learning can enable a 'jobs escalator' within organisations, with workers attaining other jobs after learning. Benefits can also therefore extend to employers, improving staff development and retention, as well as enabling employers to offer themselves as 'good employers' – not just to employees but also to other organisational stakeholders such as customers. In addition, learners can progress up the 'learning escalator', from learning that is not directly

job-related to learning that is. Such possibilities are beneficial to employers as well as employees.

It should be noted that participating in workplace learning is not without its problems. Some employees are uninterested, available learning provision can be inflexible and, although senior management can 'buy into' union-led workplace learning, line managers can be obstructive – though more likely for practical rather than ideological reasons.

For unions, participation in workplace learning also has benefits. First, unions are able to offer an additional service to existing and prospective members. Second, attitudes to unions are positively changed because of that possibility and recruitment is enhanced. The position of the union in industrial relations can also be supported by union participation in learning. More specifically, offering learning opportunities can help engage prospective new members. Union-led workplace learning can (re-)orientate workers positively in favour of unions, thereby stimulating recruitment, and turning non-members into members.

Even where evidence of direct recruitment is weak, unions report that interaction between unions and employees is nevertheless enhanced through union participation in workplace learning.

Importantly, union activism can be greatly improved in some cases – even reviving moribund branches. The successful establishment of the ULR role is one manifestation of this activism. Worker participation in learning can act as a graduating experience, with a 'roles escalator' that encourages members to become learning representatives who, in turn, graduate to other union representative positions such as health and safety or stewards. As such, the establishment of the ULR role is not at the expense of more traditional union representation but supportive of it. There is also evidence that this learning can contribute to improved industrial relations in the workplace. Union capacity to negotiate with management can be strengthened both directly – with learning becoming part of collective agreements – and indirectly by improving, or sustaining, relations between union and management.

There are some issues that need to be considered if unions are to maximise the benefit of participating in learning, particularly with respect to ULRs. Managing ULR expectations and appropriately preparing them for the role are two key issues. There can be a tendency in smaller workplaces or workplaces with a small membership for existing union representatives also to take on the potentially very demanding role of ULR. ULRs also need to be adequately integrated into wider existing union structures and have adequate support from the union if union-led workplace learning is to be successful and sustained. Identifying examples of good practice and diffusing them within and across unions can help address these problems.

However, it should be noted that, for a number of reasons, the benefits to learners and unions were not comprehensive across all three case studies.

Most benefits were felt in the NHS case: the branch was revitalised, membership has increased dramatically, younger members are being attracted to union representative positions, and activism within and outside the workplace is occurring as membership confidence grows:

*“ULRs go in and meet prospective learners and also talk to them about the benefits of joining the union. People are just waiting to join. In effect, learning is unionising the workplace.” (Union2 branch secretary)*

At FinanceCo, learning initiatives boosted membership in a less direct and extensive way. Learning has, however, brought a new and different layer of activists into union roles.

FoodCo in the north-west of England is a small operation, with one shop steward doubling as the ULR. With employees enrolled as union members during organisational induction, there has been no evidence as yet that learning has had an independent effect on membership, other than to reinforce and strengthen commitment to the union.

There are lessons that emerge from all of the case studies. The key one is that trade unions are not lessened by participating in workplace learning. Some commentators have suggested that union-led workplace learning is unduly narrow because it

promotes ‘employability’ rather than ‘democratic citizenship’ and that this focus ‘marginalises’ the purpose and activity of trade unions (see, for example, Forrester 2004). The findings from our research suggest that this argument is too simplistic. The case studies indicate that union-led workplace learning can offer renewal to trade unions because it can benefit employees’ learning for both work and non-work reasons, with employability a bridge between both. What is important is that employees are able to define the character and scope of employability. Our evidence is that they are doing so in the case study workplaces in ways that enhance their participation at work and in broader civil society. Such possibilities are attractive to potential members so that, rather than weakening trade unions, union-led workplace learning can offer trade unions renewal through the ‘spin-off’ effects noted above: a positive re-orientation of workers to unions, increased membership and re-invigorated activism.

*“I don’t think they [the union] recognise the potential and the way they could use the learning to actually recruit members... Seeing the results of HealthOrg ... people are actually saying to me: ‘Well how do you do this? Can I bottle some of it?’ And I say: ‘Well, it’s very easy. Everybody is interested in learning.’ I don’t care what you say, no matter what it is, you talk to people about learning, it’s only a matter of time before you build up that sort of relationship and they will come back to you then and talk to you and it’s a much easier way to get people interested.” (Union2 branch secretary)*

Unions’ maximisation of the benefits of participation in workplace learning is, however, contingent. Most importantly, the development of effective learning requires champions within the workplace and branches. Much effort is expended by branch officers, at least initially, to ‘switch on’ both management and workers to the learning agenda and orientate workers to unions providing that opportunity. At all three case studies, management support to initiate and sustain the learning agenda was required, a judgement supported by other studies (for example, Armistead and Shaw 2003). At FinanceCo and FoodCo, there were key management champions to get initiatives off the ground. In the NHS

case, managerial support consolidated the efforts of the branch officers – indeed, in this case, management actively worked with the union to provide a range of learning opportunities, ranging from mandatory training to lifelong learning. While at the other two case studies similar co-operation was present, there were concerns about the vulnerability that can arise from dependence on individual management champions.

There was also some indication that, though local initiatives can survive without substantial external assistance, regional union support is helpful and its absence can be a hindrance. At best, union-led workplace learning can become an integral feature of union organising in the workplace. In the NHS case, ULRs became stewards (and also undertook other regional and national activities) who, visiting wards and units within the organisation, neither compartmentalised their roles nor were perceived by workers as doing so. At FinanceCo, with a more limited supply of possible new members, this graduation by ULRs to other union roles was a double-edged sword, demonstrating the potential for union-led workplace learning to re-invigorate more traditional union activism but, ultimately, potentially creating a void between these officers and workers that had previously been filled by the ULRs. This situation is potentially problematic, given that new members were attracted by learning opportunities in the first place.

Overall, the three cases demonstrate mutual gains for unions, employees (as members or otherwise) and employers. In the NHS case, union-led workplace learning provided learning and jobs escalators in the organisation and a roles escalator within the union, and all were attractive to potential members. There are aspects of the NHS case that are undoubtedly organisationally specific. The NHS has staff recruitment and retention problems, with competition for workers from the private sector, which tends to offer higher rates of pay. The NHS therefore benefits from being perceived as a ‘good employer’, of which management’s active support for union-led workplace learning and ULRs’ efforts are part. Nevertheless, the private sector case study organisations were also keen on the

benefits of union-led workplace learning in aiding staff retention and as a promotional tool with customers.

Moreover, this learning is not limited to providing benefits to employers or even organisations. Learning for personal development also contains emancipatory possibilities for workers, with learning in this respect including courses to improve the assertiveness and learning capacities of workers not just for job-related skills development. Nor should it be assumed that management is interested in participating in union-led workplace learning only for organisationally instrumental reasons. Instead, the NHS case study management, for example, was also inclined to a learning agenda that encouraged personal development with learning for learning’s sake. This position helped foster a learning culture within the organisation.

The fact that union-led workplace learning can produce mutual gains for unions, employees and employers does not necessarily mean these particular, or any, initiatives will automatically continue. Aside from the broader question of continued support and resources from government, there are a number of sustainability issues. The NHS case does seem to have a clear developmental dynamic. At FoodCo, management and union are aware of the existing, fragile arrangements and intend to expand the scope of learning to include areas such as IT skills, involve a newly appointed ‘people manager’ and, most importantly, set up a site-level learning sub-committee “so it won’t just be me and [the learning representative] spouting about it any more” (depot manager). Despite the success at FinanceCo and its potential for roll-out, sustainability at the site ultimately depends on identifying a wider range of learner needs.

There may be limits therefore to providing and sustaining union-led workplace learning where there is not at least some connection to workplace issues. Equally, where there is no benefit to unions, sustainability will be undermined. In this respect, the three case studies presented here demonstrate that unions can have a positive effect on the organisation of workplace learning and that, just as importantly, this learning can have a positive effects on trade union organisation.

# Concluding remarks

The labour government sought to enhance union-led workplace learning as a way of stimulating greater participation by workers in lifelong learning and thereby improve the skills base of the UK economy.

This research has demonstrated that this outcome is being achieved, with many workers previously out of the learning loop being attracted back into learning. The research finds that for employees, union-led workplace learning can provide additional learning and training previously absent (in some cases for many years) from their employment.

Not surprisingly, the three types of possible learning – for personal development, job-related and to enhance employability – were evident and welcomed by learners for their fit with personal circumstances and needs. There is some evidence that union-led workplace learning can enable a ‘jobs escalator’, with workers attaining other jobs in the organisation. Benefits can therefore also extend to employers, improving staff retention and development as well as enabling employers to offer themselves as ‘good employers’ – not just to employees, but to other organisational stakeholders. Learners can also progress up a ‘learning escalator’, from learning that is not directly job-related to learning that is. This can also be beneficial to employers.

For union-led workplace learning initiatives to be sustained, however, there must also be gains for unions. The research found that, through participating in learning, unions are able to offer an additional service to existing and prospective members. This service changes attitudes to the union in a positive way and enhances recruitment. Where evidence of direct recruitment is weak, unions reported that interaction between unions and employees is nevertheless enhanced. Importantly, union activism can be greatly improved, even reviving moribund branches. The successful establishment of the ULR role itself is one manifestation of this activism. More broadly, worker participation in learning can act as a graduating experience, providing a ‘roles escalator’ that encourages members to become ULRs who, in

turn, graduate to other union representative positions such as health and safety or stewards. As such, the establishment of the ULR role is not necessarily at the expense of more traditional union representation but can be supportive of it. Finally, there is also evidence that this learning can contribute to improved industrial relations in the workplace.

These benefits were not comprehensive across the case studies and there are issues that need to be recognised. In terms of learning, some employees are uninterested, available learning provision can be inflexible and, although senior management can ‘buy into’ union-led workplace learning, line managers can be obstructive – though more likely for practical reasons rather than ideological objection. For unions, managing ULRs’ role expectations and preparing ULRs for the role are two key issues. There can also be a tendency in smaller workplaces or in workplaces with a small membership for existing union representatives also to take on the potentially very demanding role of ULR. As a new role, ULRs also need to be adequately integrated into wider existing union structures and be appropriately supported if union-led workplace learning is to be sustained. Identifying examples of good practice and diffusing these examples within and across unions can help address these problems.

On the whole, the research found that not only has union-led workplace learning clear, positive and recognised effects for union and potential union members, learning also has clear, positive and increasingly recognised effects on union organisation. The key point is that trade unions are not lessened by participating in learning, but enhanced by it. The findings suggest the argument that union-led workplace learning is narrow because it promotes employability and marginalises trade unions is too simplistic: instead, the case studies indicate that union-led workplace learning can offer renewal to trade unions. However, unions’ maximisation of the possible benefits is contingent.

The development of effective learning requires union and management champions. While local initiatives

can survive without substantial external assistance, regional union support is helpful and its absence can be a hindrance. The fact that union-led workplace learning can produce mutual gains for unions, learners and employers does not necessarily mean initiatives will automatically continue. There may be limits to providing and sustaining learning where there is not at least some connection to workplace issues. Equally, where there is no benefit to unions, sustainability will be undermined. In this respect, the three case studies demonstrate that unions can have a positive effect on the organisation of learning and that, just as importantly, this learning can have a positive effect on trade union organisation.

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