

# unionlearn

with the TUC



# Learning works

Report of the 2009 survey of union learning  
representatives and their managers



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## unionlearn

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

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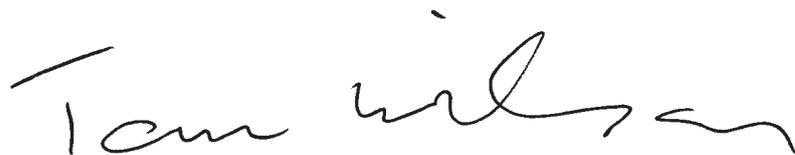
## Foreword



The impact of union learning representatives on the life and work of their colleagues is well established and has been recognised at the highest levels of both government and business. This, the fifth national survey of ULRs, shows that their influence continues to increase along with their commitment. It is illuminating that, on average, every ULR gives as much of their own time to the role as they are given by their employers, and indicative of the dedication shown by so many.

This is the first survey of ULRs and their managers held during a period of economic recession. In the past, when employers have had to find budgets to cut, training has been the first to go. ULRs have had the added challenge of combating that tendency, seeking opportunities to enhance the skills base of their colleagues in order to improve their chances in a shrinking labour market. It is encouraging to see that most managers still value the contribution of their ULRs, and that only two fifths report cuts to training budgets.

It is not all rosy, there are still ULRs who feel undervalued and unsupported and there are even some managers of ULRs who fail to recognise their value. Feeling valued and supported is an important factor contributing to the achievements of the most productive ULRs, alongside the existence of learning agreements and learning partnerships. Whilst providing overwhelming evidence of the massive contribution ULRs are making, this report also identifies areas where increased effort is needed to support them, and its findings will underpin unionlearn's ongoing strategy.



Tom Wilson

## Executive summary

This report contains the findings of the 2009 national survey of union learning representatives (ULRs) and their managers. For the first time, the survey included both active ULRs and those who currently class themselves as inactive. In total, 1,292 ULRs responded to the survey. Of these, 968 responses were received from active ULRs and 324 responses were received from inactive ULRs. This represents an overall response rate of 12.1 per cent. In addition 112 managers responded to the survey, a response rate of 42.4 per cent.

### Who are today's ULRs?

- Of active ULRs, 43.1 per cent are women, 91.6 per cent are white and 61.1 per cent are aged between 46 and 60.
- The proportion of women (active) ULRs and those from Black and Minority Ethnic (BME) communities has increased between 2007 and 2009.
- Active ULRs are more likely to be women and to belong to BME communities than other union representatives.
- Over 37 per cent of active ULRs are new to trade union activity, up from 36 per cent in 2007.

### Where are ULRs active?

- Over two-thirds of active ULRs work in the public sector and over one quarter work in public administration.
- Just over 7 per cent operate within manufacturing compared to 15 per cent two years ago.
- Two thirds of active ULRs cover organisations employing over 1,000 employees, but the proportion of active ULRs in small and medium sized organisations has increased from 7 per cent in 2005 to almost 13 per cent today.

## What is the context for union learning?

- More than three-quarters (76.5 per cent) of active ULRs received 'reasonable' time off to conduct their role compared to 70 per cent in 2007.
- Only 41.5 per cent received cover for their regular job and just over a quarter had their workload reduced to allow for ULR activity. More than half (54 per cent) received neither cover nor reduced workload – unchanged from 2007.
- Typically, ULRs spent four hours per week on union learning activities but received only two hours paid time off.
- A majority of active ULRs felt that they were restricted by work pressures.
- Almost 57 per cent of active ULRs worked within the context of learning agreements and almost half worked in organisations with a formal learning partnership.

## Are ULRs valued and supported?

- The overwhelming majority of active ULRs felt that they were adequately supported by the union (80 per cent), unionlearn (75.1 per cent) and their work colleagues (74.2 per cent). More than 87 per cent stated that they were happy to continue as ULRs.
- Two-thirds of active ULRs reported that they received adequate support from their line managers but less than half felt that this applied to senior management.
- Only 34.1 per cent of active ULRs felt valued by senior management.
- Two-thirds of active ULRs reported that they negotiate with their employer over learning. More than a quarter met with their employers to negotiate more than four times per year.

## What do ULRs do?

- Information and advice on learning opportunities was provided by 94.2 per cent of active ULRs (in the 12 months prior to the survey) compared to 85 per cent in 2007. More than three-quarters had arranged or helped to arrange courses for colleagues.
- Almost three-quarters of active ULRs had helped to recruit new members into their union in the last year.
- Higher activity was more likely to be found in large organisations and, crucially, those with a formal learning agreement, learning partnership and where the employer had signed the Skills Pledge.
- Over the last 12 months 42.2 per cent of active ULRs reported an increase in their activity compared to 27.2 per cent who reported a decrease.



### Do ULRs make a difference?

- Almost all active ULRs believed that they have increased awareness of learning amongst their colleagues. The vast majority claimed that their activity has increased both the number of colleagues being trained (78.3 per cent) and the amount of training received by each of those colleagues (74.8 per cent). Almost eight in every ten (active) respondents reported that their activity had helped workers with little prior experience of learning.
- Two-thirds of active ULRs reported that their activity improved management/union dialogue and almost 60 per cent that it improved management/union relationships in general.
- There was no substantial difference in the perceived impact of active ULRs between those working in the public and private sectors.
- ULRs covered by learning agreements, learning partnerships and the Skills Pledge were more likely to report that their activity was having 'high' impact.
- Almost 60 per cent of managers surveyed reported improved basic skills as a result of ULR activity, and a majority agreed that ULRs had helped to close skills gaps and improve union-management relationships.

### Has the recession had an impact on ULR activity?

- The survey suggests that the recession has seen a re-alignment in organisational priorities creating challenges for ULRs. Over a third of active ULRs reported that senior management are now less committed to union learning.
- Just over 45 per cent of active ULRs reported a cut in training spend while almost half claimed that there was a greater focus on job related training. Around a third of active ULRs reported less time for ULR activities.
- Managers who were surveyed confirmed the shift towards job related training and the pressure on training budgets but almost 90 per cent claimed that the recession had not undermined their support for union learning.

## Introduction

Existing research points to the significant success of union learning representatives (ULRs). We know that ULRs help employees to develop their skills and gain new qualifications (DIUS, 2007:59). They have also played a key role in the development of effective learning partnerships with employers (Munro and Rainbird, 2004; Wallis and Stuart, 2007). In addition ULRs have contributed to the strengthening of trade union organisation (Moore and Wood, 2007). However, evidence also shows that ULRs face a number of key challenges (Bacon and Hoque, 2008, 2009; Stuart, 2008). Firstly, ULR activity appears to be dependent on the degree of employer engagement. Without the support of employers, ULR activity may be much more difficult. Secondly, while ULRs may flourish in organisations with strong union organisation, this could be harder where unions are peripheral to organisational life. Finally, ULR activity is inevitably shaped by the demand for learning from members and this in turn can be affected by the organisational context in which workers find themselves.

Crucially, the recent economic recession threatens to amplify these challenges. Trade unions may, understandably, place greater emphasis on protecting jobs and conditions rather than on union learning. Similarly, employers' priorities may be realigned towards short-term survival and away from longer-term investment in learning and development. This, in turn, may transmit to learning partnerships forged during periods of growth. Finally, job insecurity may have a negative impact on employee demand for learning.

Therefore this survey and report aims to both examine the current state of development of the ULR community and also critically assess the key challenges it faces.

The sample frame for the survey of ULRs was unionlearn's database of 10,713 ULRs. For the first time, separate questionnaires were developed for active and inactive ULRs. This was designed to shed light on the reasons why ULRs ceased their activity. The questionnaire for active ULRs was relatively detailed and contained questions asked in previous surveys and also new batteries of attitudinal questions relating to employer support, member attitudes to learning and the impact of the recession. The questionnaire for inactive ULRs was much shorter in order to maximize response. Consequently, it targeted demographic data while probing for information regarding reasons for inactivity.

Both surveys were initially distributed by unionlearn by post in October 2009, with a covering letter and a pre-paid return envelope. Respondents were also given the opportunity of responding to an electronic version of both surveys, details of which were also circulated to affiliate trade unions. Subsequent reminders were sent by post and (where possible) electronically. ULRs were also asked to provide contact details for their managers who had responsibility for union learning issues. Details of 264 managers were received. A separate



questionnaire was designed in respect of managers and this was sent out electronically (where e-mail addresses had been provided) and also by post.

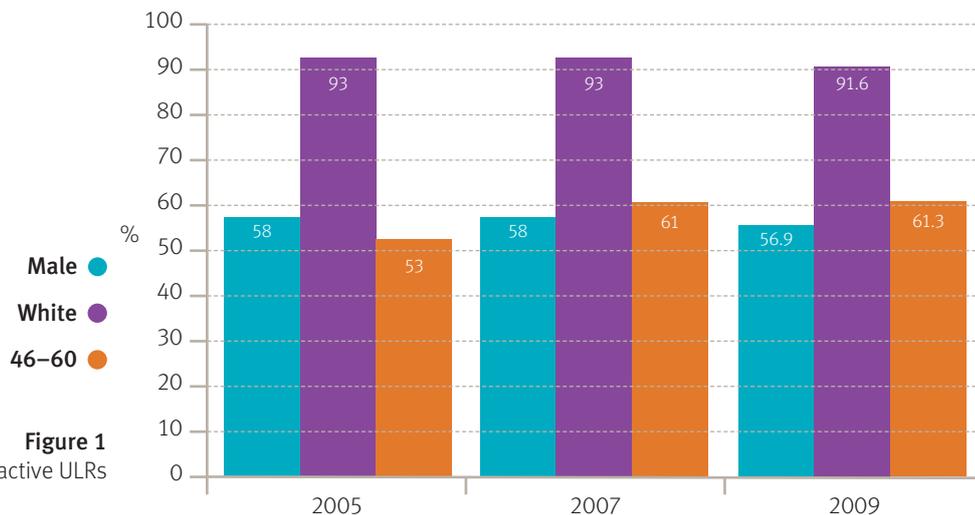
In total, 1,292 ULRs responded to the survey. Of these, 968 responses were received from active ULRs and 324 responses were received from inactive ULRs. This represents an overall response rate of 12.1 per cent. In addition, a total of 112 usable responses were received from managers, a response rate of 42.4 per cent.

# Union learning representatives increasing diversity, extending organisation?

Previous surveys have suggested that union learning representatives are an important source of diversity within the union movement and that they represent a new generation of union activists. The 2009 survey confirms this. Moreover, while ULRs are still mainly found in the public sector there is evidence of increased presence in smaller organisations.

## Who are today's ULRs?

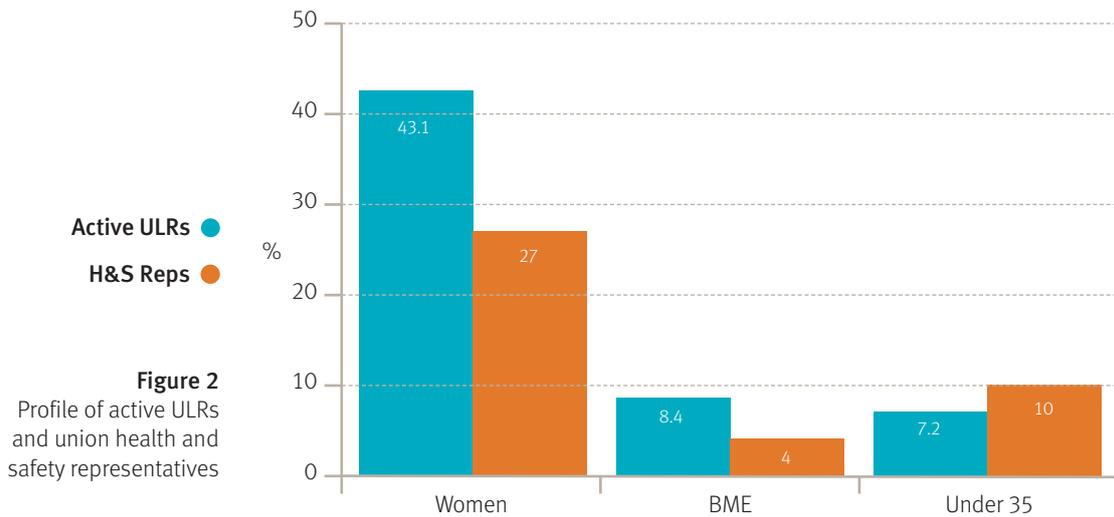
While the typical ULR is male, white and middle aged, the 2009 survey provides continuing evidence that the growth in the ULR community represents a positive force for increased diversity within trade union organisation. Just over 43 per cent of active ULRs are women (a marginal increase on 2007) and an increasing proportion (8.4 per cent compared with 7 per cent in 2007) come from the black and minority ethnic (BME) communities.



**Figure 1**  
Profile of active ULRs

There was little difference between inactive and active ULRs in terms of gender and ethnicity, while active ULRs tended to be younger than their inactive colleagues.

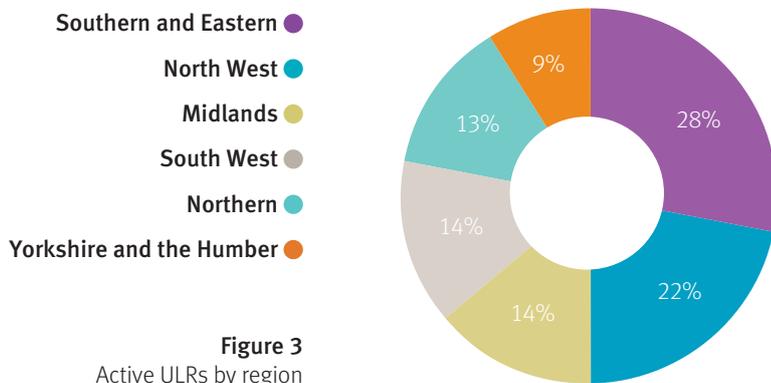
In important respects the active ULR population appears to be more diverse than other groups of trade union representatives. Figure 2 (below) compares the profile of active ULRs against that of health and safety representatives (as captured in the TUC's 2008 national survey of health and safety representatives).



Just over a quarter (27 per cent) of health and safety representatives are women, compared to 43 per cent of active ULRs. In addition, active ULRs are more likely to come from BME communities than their health and safety representative colleagues. However, younger workers (under 35) are less well represented amongst active ULRs than health and safety representatives.

### Where are ULRs active?

Active ULRs responding to the survey came from a wide range of 30 trade unions. There was also a relatively balanced geographical spread (see Figure 3) with over a quarter (27.9 per cent) coming from the Southern and Eastern region.



There have been some noticeable changes in the breakdown by industrial sector when compared to the 2007 survey (see Table 1). Perhaps most apparent is the continued reduction in the representation of active ULRs within UK manufacturing. In 2009, just 7.4 per cent of active ULRs came from manufacturing compared to 15 per cent in 2007. At the same time, there have been notable increases in the proportion of active ULRs in education, business services and other community, social and personal services.

**Table 1 Active ULRs by industrial sector**

	2009	2007
	%	%
Public administration	27.6	26
Transport and communications	16.8	16
Education	12.4	10
Health and social work	10.8	15
Other community, social and personal services	9.9	8
Manufacturing	7.4	15
Business services	4.9	1
Wholesale/ retail	4.4	5
Construction	1.8	1
Financial services	1.7	1
Hotels and restaurants	.5	n.a.

Active ULRs were found predominantly in the public sector. However, the proportion of active ULRs in the public sector fell from 71 per cent in 2007 to 69.5 per cent in 2009. There was also tentative evidence that ULR activity is beginning to extend into smaller organisations. Figure 4 (below) shows that, between 2005 and 2009, there has been a large reduction in the proportion of ULRs active within organisations with over 1,000 workers, while the proportion of respondents working in small and medium-sized organisations (up to 250 employees) has increased, to 12.9 per cent.

It would therefore appear that ULRs are increasingly active outside the relative safety of large organisations. However, this is not without its own challenges – over one-third of active ULRs (37.1 per cent) responding to the survey, were the sole representatives in the site(s) that they covered (see Table 2, below).



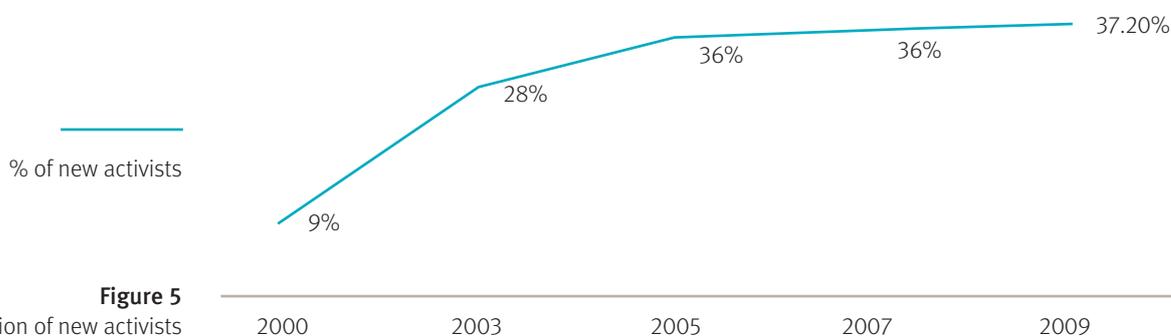
**Table 2 Active ULR presence and workplace size**

No. employed at site	1 ULR	2-4 ULRs	5 or more ULRs	Median no. of ULRs
	%	%	%	%
0-49	70.6	19.6	10.8	1
50-100	59.6	30.0	10.4	1
101-250	52.2	46.1	1.7	1
251-500	33.5	40.2	26.3	2
501-750	13.3	53.4	33.3	4
751-1000	19.3	30.7	50.1	4
Over 1000	14.8	37.0	48.2	4

Almost all active ULRs (97.3 per cent) worked in organisations in which their trade union was recognised for collective bargaining purposes. Moreover, 90 per cent of active ULRs working in small and medium-sized organisations (SMOs) enjoyed union recognition. Furthermore, active ULRs tended to be found in organisations with relatively high levels of union density. Almost 63 per cent of active ULRs operated within organisations with union density of 60 per cent or more.

### ULRs – a new wave of activists?

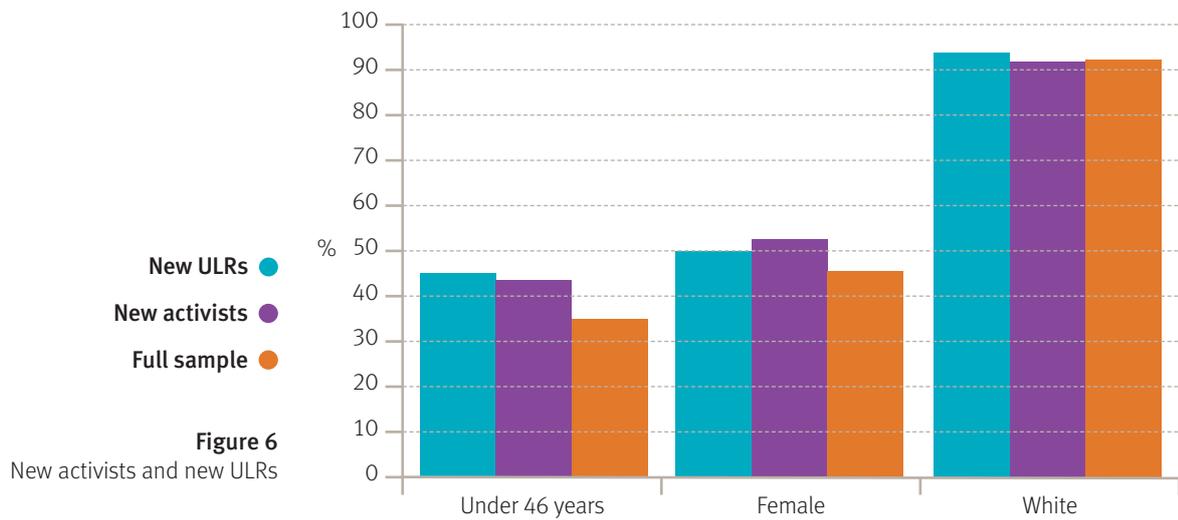
An important finding of previous surveys was the high proportion of ULRs who had not previously held a union post. The 2009 survey supports the argument that ULRs represent an influx of new activists with the potential to both strengthen existing trade union organisation and also extend union activity into parts of the labour market where unions have traditionally had little presence.



**Figure 5**  
Proportion of new activists



Over a third of active ULRs (37.2 per cent) had not previously held a trade union post, a slight increase in the proportion of new activists on the last survey in 2007 (36 per cent). Importantly, new activists and also those respondents who were new to ULR activity (two years or less) were more likely to be women and



more likely to be 45 years old or younger. Consequently not only is the active ULR population becoming increasingly representative of the workforce as a whole, but the growth of the ULR community is a significant source of increased diversity.

More than six out of every ten ULRs combined their ULR role with another task. It could be argued that combining ULR activity and other trade union roles may impose an unsustainable burden on union activists. However there was no evidence that such ULRs were any more likely to become inactive than those with no additional responsibilities.

## Case study

### Julie Wymer National Union of Teachers

**“I have got a lot of personal development from my ULR role and I want to share it with colleagues.”**

Five and half years ago, Julie responded to an article in the NUT magazine for volunteers to get involved as ULRs. She completed the TUC’s ULR training and has since completed other courses provided by both the TUC and the NUT. Like many other ULRs, Julie had not previously held a post within her union. In the beginning it took time for her to understand the structure and protocols of branch and wider union organisation. But, her ULR activity has now led her to become actively involved in broader NUT activities.

There are no other ULRs in Julie’s region and she covers 1600 members in 80–90 schools. Clearly Julie cannot be physically present in all those locations so she communicates with members via a newsletter and email bulletins.

Julie feels well supported in her role by the NUT (both regionally and nationally). She also gets six hours a week facility time to fulfil her ULR duties. She has found that opportunities for networking with other ULRs in London boroughs and interaction with local authorities have been really helpful. Her facility time also allows her to attend the annual NUT ULR forum which is invaluable for connecting with other ULRs in the union.

Over the last 12 months Julie’s ULR activity has increased significantly. Collaboration within the sector to provide training opportunities has been successful, for example contributing to a Young Teachers’ weekend development event and facilitating a very successful pre-retirement course that has run for the past four years.

However, Julie still faces challenges. As teachers, her members cannot meet with her in work time. This also makes it difficult for members to attend learning and training events as they have to get relief cover to be out of the classroom. Nonetheless, Julie has worked closely with her local authority to promote Continuing Professional Development (CPD) activity within her local area. She is hopeful that the CPD publicity will raise colleagues’ awareness of their opportunity to talk to a ULR and access new learning opportunities.

## Union learning representatives supported and valued?

The problems experienced by ULRs in carving out time to conduct ULR activity place a sharp focus on the support that they receive and the environment in which they operate. The 2009 survey finds that, while happy with the support from colleagues and the union movement, ULRs are constrained by work pressures and a lack of time for ULR work.

### ULR training and support

The starting point for most ULRs is their training. The survey found that over three quarters of active ULRs completed the TUC's ULR training, while almost 68 per cent completed a course provided by their own union. In addition, more than 60 per cent had taken additional modules to support their ULR activity. Only 3.7 per cent of respondents had not been trained either by the TUC or their own union. Furthermore, just 13.5 per cent of active ULRs felt inadequately trained for the role, compared with over a quarter of ULRs who said in 2007 that they did not feel that they had yet received sufficient training to be able to carry out their role effectively. ULRs were also positive about their role and the support that they receive. The vast majority (87.1 per cent) said that they were happy to continue as ULRs; that they get sufficient support from their union (80 per cent); and that they get sufficient support from unionlearn (75.1 per cent). Almost three-quarters believed that their work colleagues were supportive of them.



**Table 3 Attitude of members to learning**

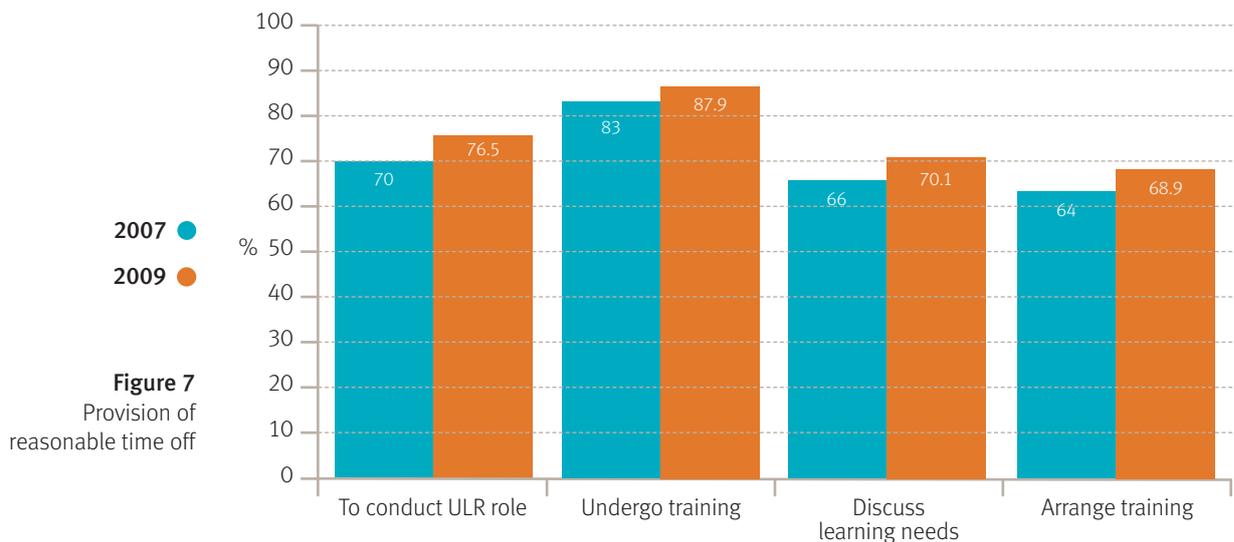
To what extent do you agree or disagree with the following statements regarding the attitude of your members to learning?

	Agree strongly	Agree	Unsure	Disagree	Disagree strongly
Interest in learning amongst members is high	11.3	44.5	21.2	19.3	3.7
Most members want job-related skills	10.8	52.7	16.0	18.8	1.7
Members find it difficult to take up learning opportunities because of pressure of work	29.3	49.7	11.7	8.6	0.6
Formal qualifications are important to my members	18.1	49.2	22.8	8.9	1.1
Most members will only go on courses if they are in work time	24.6	47.3	13.0	13.7	1.3
Training in basic skills is important to my members	18.5	38.8	23.6	13.8	5.3

The attitude of members to union learning is something that has sometimes been overlooked. While the survey did not examine the views of members directly, active ULRs were asked about their members' attitudes (see Table 3, above). Only 55.8 per cent of active ULRs reported high levels of interest from members in learning. Moreover, almost half of those ULRs who were not active did not believe that members were 'really interested in learning'. However, this could reflect tensions between learning, work pressures and domestic responsibilities. The vast majority of active ULRs (79 per cent) agreed that members find it difficult to take up opportunities to learn due to work demands.

### Time off for ULR activity

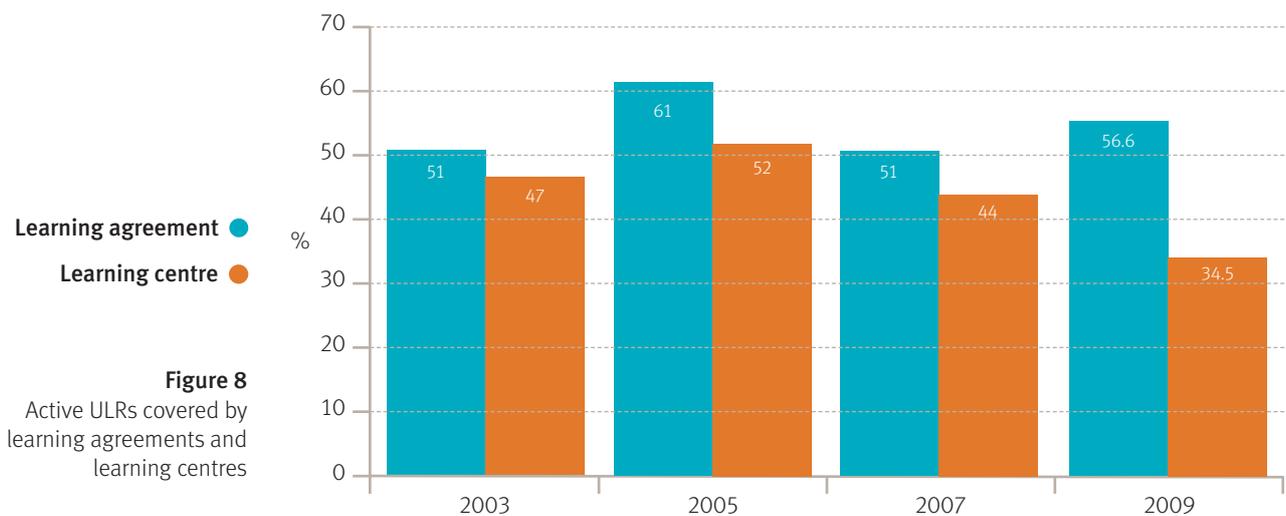
In light of the above, the issue of employer support is crucial. A basic test of this is the extent to which statutory rights relating to ULRs are adhered to. In 2003, a legal entitlement was established to 'reasonable' paid time off for ULRs to conduct their duties. The 2009 survey shows a general improvement in the provision of time off for ULRs compared with 2007 (see Figure 7 below). This may reflect increased awareness of statutory entitlements.



However, over 30 per cent of active ULRs still claimed that they did not get reasonable time off to arrange learning or training. Furthermore, ULRs are having to dip into their own personal and leisure time in order to maintain their levels of activity. Typically, ULRs spent four hours every week on their ULR work but received only two hours of paid release. In addition, when most ULRs return to their normal duties, they then have to make up for time and work lost, placing them under intense pressure. As in 2007, only 46 per cent of active ULRs received cover for their regular job and/or a reduced workload.

### Working with employers

Learning agreements have been seen as key to effective ULR activity. The 2009 survey shows an increase in the proportion of active ULRs reporting agreements compared with 2007 from 51 per cent to 56.6 per cent (see Figure 8, below). However, this still falls short of the 61 per cent reported in 2005. Almost 45 per cent of (active) respondents reported that their employers had signed the Skills Pledge and just under one third of all respondents worked at sites covered by both a formal agreement and the Skills Pledge.



Almost one half of active ULRs (46.7 per cent) also worked within the context of a formal learning partnership with just over half having access to a working group or committee that discussed union learning issues. Furthermore, over a quarter of active ULRs reported that their employer used the Train to Gain service, an increase from 22 per cent in 2007. However, at these sites, over one-third of ULRs were not involved in this process. Only 34.5 per cent reported the existence of a union learning centre, continuing a downward trend from 52 per cent in 2005 and 44 per cent in 2007.

A crucial part of ULR activity is liaising with the employer over learning issues. The survey found a mixed picture in terms of the frequency and nature of contact as Table 4 (below) shows. Around two-thirds of active ULRs negotiated with their managers regarding learning, while three-quarters consulted over these issues. The 2007 survey reported that around 15 per cent of ULRs ‘normally’ negotiated training with managers while WERS 2004 found that training was subject to negotiation in just 9 per cent of unionised workplaces.

**Table 4 Extent of negotiation over learning**

	<b>Negotiate with managers</b>	<b>Consult with managers</b>
	%	%
Once yearly	15.2	14.1
Twice yearly	12.0	11.5
Four times a year	10.5	12.7
Four times a year	27.8	36.8
Never	34.5	24.9
Total	100.0	100.0

While not directly comparable, the findings above suggest that learning and training is a key collective bargaining issue in a significant proportion of workplaces. However, like the 2007 survey, there is a substantial minority who appear to have little contact with their managers over learning. More than a third (34.5 per cent) never negotiated and just under one-quarter (22.8 per cent) of active ULRs neither negotiated nor consulted.

### **Employer attitudes to ULR activity**

In general, ULRs’ perceptions of employer attitudes towards ULR activity appear to be relatively positive. Most felt that learning was a high priority for their organisation and that senior management recognised the importance of basic skills. There was an interesting contrast between perceptions of line manager attitudes and senior management. Two-thirds of (active) respondents believed they received adequate support from line managers but less than half felt this in respect of senior management. Moreover only 34.2 per cent of active ULRs felt valued by senior management. If these results are broken down by sector, size of organisation and by the existence of a learning agreement, a clear pattern begins to emerge (see Table 5 below).

In general, a higher proportion of active ULRs in both public sector and larger organisations felt valued by their employer and consequently received the time needed to undertake their role. However, the most striking difference was between those active ULRs covered by a formal learning agreement and those not. Less than half of active ULRs who worked without a learning agreement felt that they were given enough time to conduct their role compared to nearly three-quarters (73 per cent) of those who were covered by such an agreement.

**Table 5 Employer attitudes to the role of ULRs by sector, learning agreement and learning partnership**

	Agree	Unsure/ disagree
<b>My line manager values my ULR activities</b>		
	%	%
Public sector	50	50
Private sector	43	57
SMO	42	58
Larger organisation	49	51
Learning agreement	57	43
No learning agreement	37	63
<b>Senior management value my ULR activities</b>		
Public sector	35	65
Private sector	33	67
SMO	35	65
Larger organisation	34	66
Learning agreement	43	57
No learning agreement	24	76
<b>My line manager gives me enough time for ULR work</b>		
Public sector	63	37
Private sector	55	45
SMO	50	50
Larger organisation	63	37
Learning agreement	73	27
No learning agreement	45	55

## What do ULRs need?

Active respondents were also asked to state what had helped them most during their time as a ULR. Three broad issues dominated responses here:

- support from unionlearn, trade unions and by networking with other ULRs
- extent and quality of training
- facility time and employer support.

In addition ULRs were asked to suggest further steps that unionlearn and/or their union do take to support their activity. The following issues were highlighted:

- Inform and educate employers regarding the benefits of union learning.
- Continue to encourage unions to include ULRs in branch structure.
- Facilitate inter and intra union networks for ULRs.
- Identify and facilitate progressive training opportunities for ULRs.
- Provide timely information about funding and initiative opportunities.
- Consider the specific issues of peripatetic/mobile ULRs.
- Continue to lobby government in respect of the provision of funding to support the ULR initiative and maintain and, if possible, develop statutory rights for ULRs and their members.

Inactive ULRs had similar views in respect of support of their union and colleagues to their active counterparts. Almost 80 per cent reported that they were well supported by their union and 72 per cent felt that their colleagues were supportive. Therefore, lack of support does not appear to have been a major factor in ULRs ceasing activity. Responses were less clear cut in regard to management support. In particular, 43.4 per cent of inactive ULRs claimed that they did not receive adequate support from senior management. Interestingly, over two-thirds of inactive respondents agreed that work pressures restricted their activities. This was reflected in the reasons that inactive ULRs gave for ceasing ULR activity. While the most commonly cited was redundancy, retirement or change in job function, a substantial minority of respondents claimed that they ceased activity because of the pressure of work and a lack of facility time. Only a very small number of inactive ULRs blamed a lack of support from their union.

## Union learning representatives continuing to make a difference?

The 2009 survey shows that an increasing proportion of ULRs are actively making a difference to workers' learning opportunities. This is reflected in increased activity and greater numbers of members benefiting from learning and training. While their managers recognise the positive impact made by ULRs, this success appears to be dependent on employer commitment and support.

### What do ULRs do?

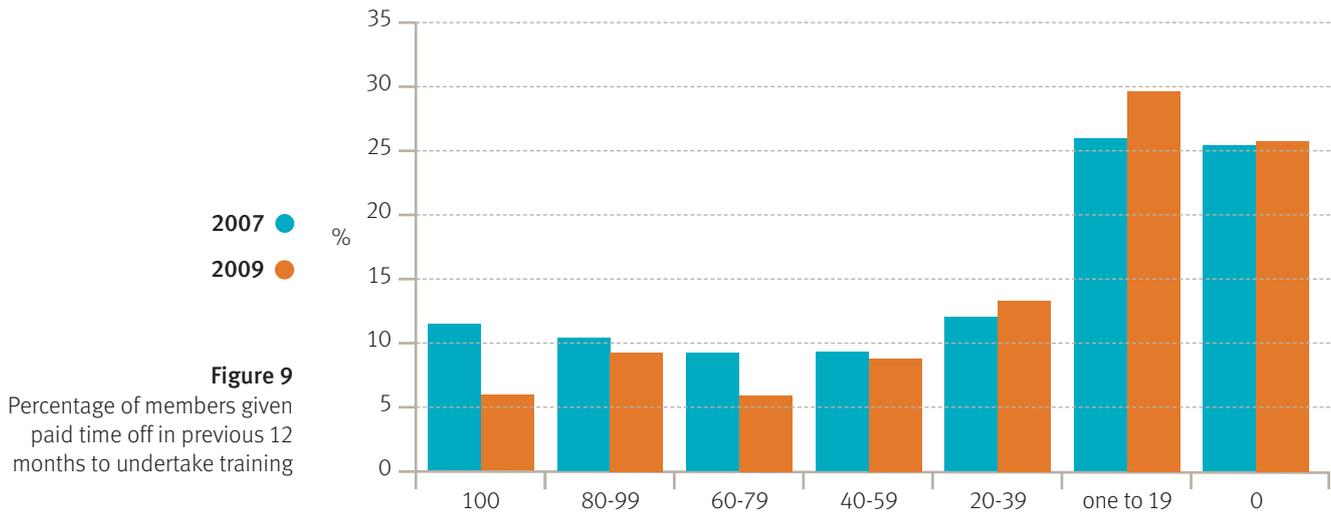
In the 12 months prior to the survey, more than three-quarters of respondents had arranged or helped to arrange courses compared with 59 per cent in 2007. Interestingly nearly three-quarters (74.3 per cent) claimed to have recruited or helped to recruit new members into the union, emphasising the organising potential of ULRs.

**Table 6 Nature and extent of ULR activity**

<b>In the last 12 months, have you:</b>	<b>2009</b>	<b>2007</b>
	%	%
Provided information and advice to colleagues on learning opportunities?	94.2	85
Helped colleagues to get funding for learning?	48.5	n.a.
Arranged (or helped to arrange) courses for colleagues?	76.7	59
Recruited (or helped to recruit) new members into the union?	74.3	n.a.
Conducted a learning needs assessment?	53.2	47
Met and/or networked with ULRs from other workplaces?	79.3	n.a.

On average each active ULR had helped 44 colleagues with their learning in the last year while more than a quarter of respondents claimed to have helped 50 colleagues or more. Importantly this number was higher where ULRs were supported by cover/reduced workload for their activity; worked within an organisation that had signed the Skills Pledge; or had a formal learning agreement or learning partnership.

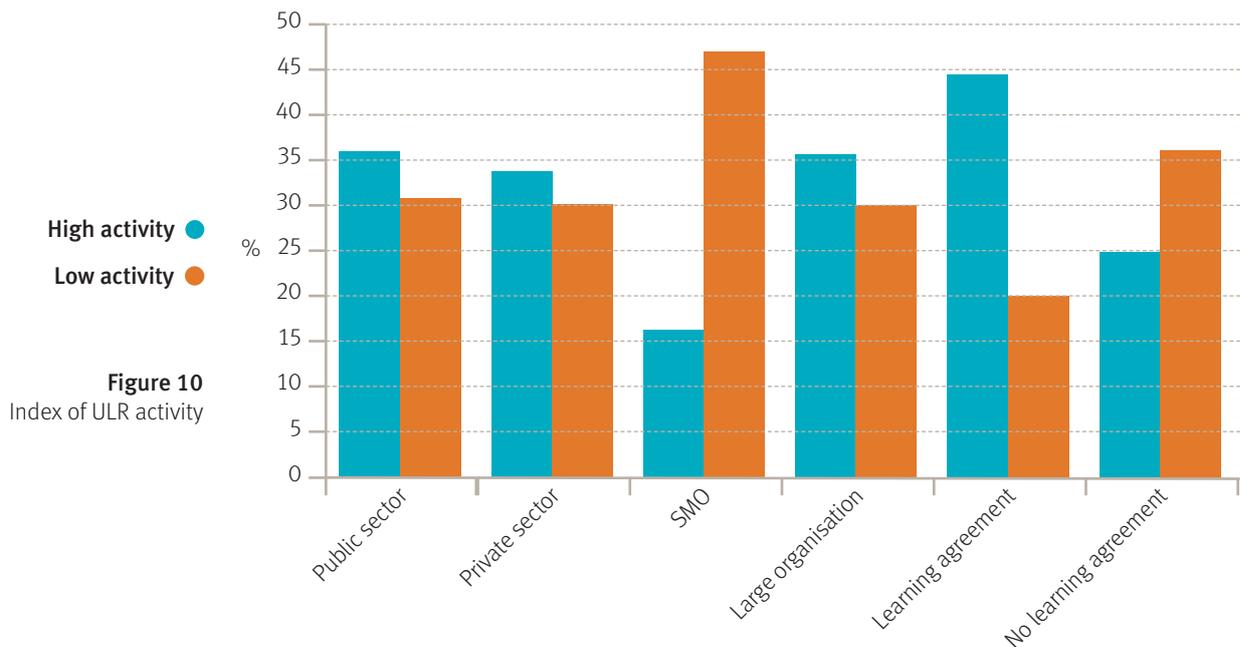
In order to maximize the benefit of union learning, members need to be able to find time to develop new and existing skills. Overall the data would seem to suggest that there has been a squeeze on paid time off for training. Just over a quarter of active ULRs in both 2007 and 2009 reported that their members received no paid time off. However, the proportion of respondents reporting that between 40 per cent and 100 per cent of their members received paid-time off fell. Moreover, less than half (46.4 per cent) of the active ULRs responding to the survey reported that their members had a formal entitlement to paid time off for learning.



Workers in the public sector were more likely to receive paid time off than their private sector counterparts. Around one-third of active ULRs from the public sector reported that 40 per cent or more of their members had received paid time off compared to less than one fifth of their private sector counterparts. The survey also found that workers in organisations that had signed the Skills Pledge were more likely to receive paid time off. The existence of a learning agreement and/or learning partnership also had a positive impact in this respect.

### Explaining ULR activity

In order to identify factors that might shape the extent of ULR activity, an index was derived that allowed active ULR responses to be categorised into those reporting low, medium and high activity. This was then examined in respect of sector, organisation size and the existence of a formal learning agreement. The results are illustrated in Figure 10 below.

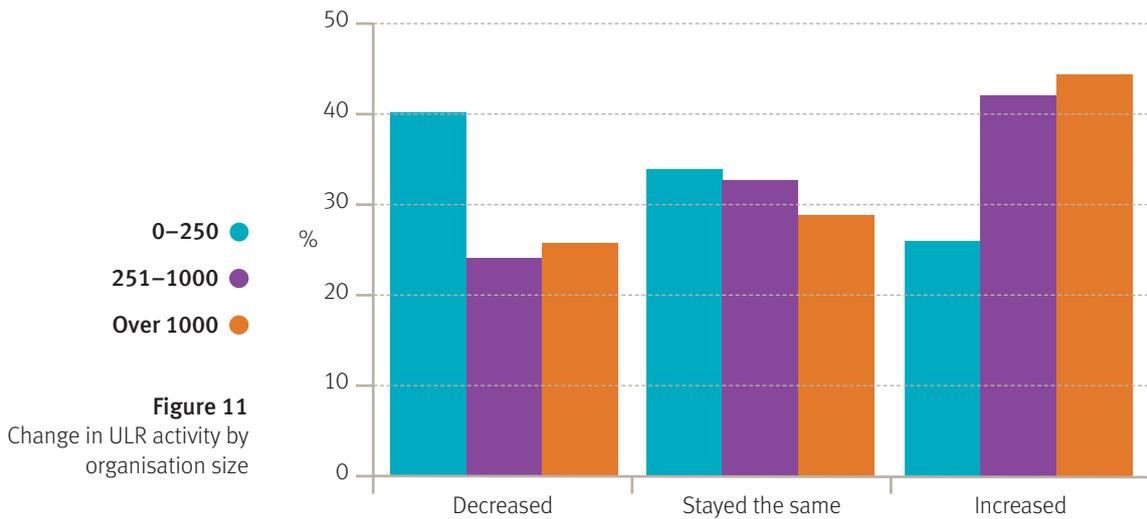


While there was relatively little difference between the extent of activity reported by ULRs in the public and private sector, organisation size and the presence of a learning agreement appears to have a substantial impact. Reported activity was much more likely to be high in larger organisations than in SMOs. Similarly, almost half (46 per cent) of active ULRs reporting the existence of a formal learning agreement also reported high levels of activity compared to just over one-fifth of those where no such agreement was in place. The initial multivariate analysis confirmed these associations. Importantly, this also suggested that reported activity was likely to be highest at sites at which a formal learning agreement, a learning partnership and the Skills Pledge were all in place.

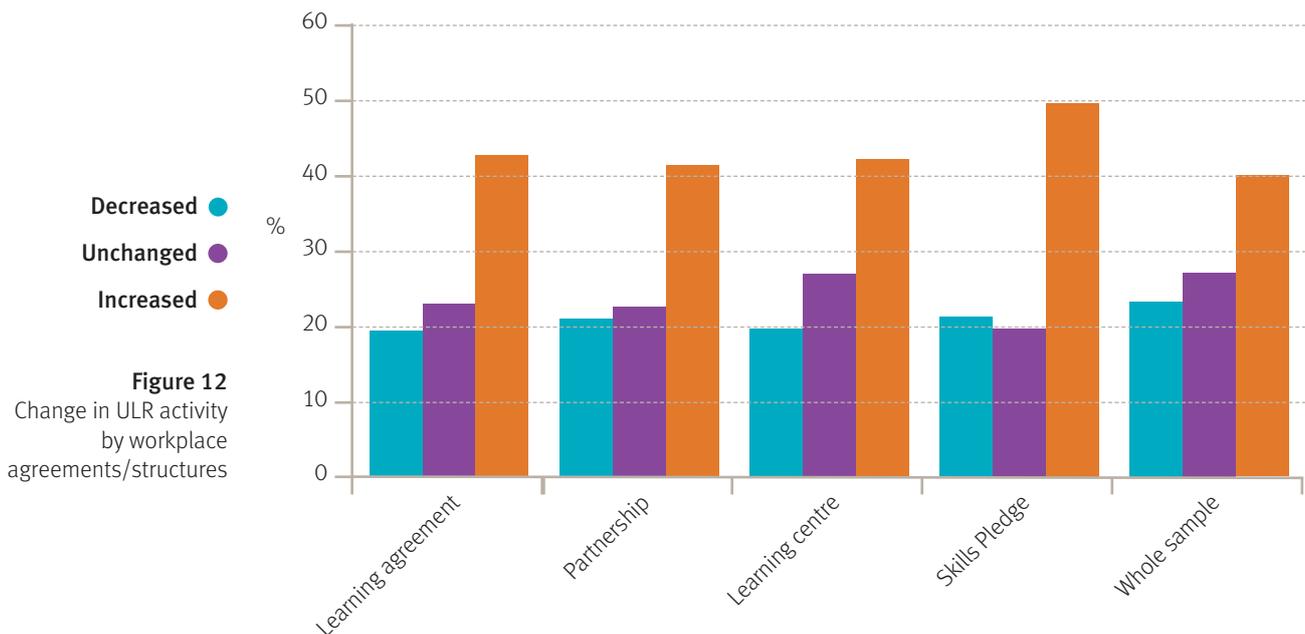
ULRs were also asked whether their activity had increased or decreased over the last 12 months. More than four in ten (42.2 per cent) active ULRs reported an increase and an additional 30.6 per cent reported that it had stayed the same. However, at the other end of the spectrum, more than a quarter of active ULRs reported decreased activity with 15.3 per cent stating that their activity had decreased ‘a lot’.

It is useful to explore the factors that might underpin increasing ULR activity. Firstly, it could be suggested that the experience of ULRs themselves may be important. For example, those new to the role and also to trade union activity may find it difficult to have an impact. However, there appears to be very little evidence of this. In fact, a higher proportion of these ‘new activists’ (48 per cent) reported an increase in activity than experienced ULRs (39 per cent).

The context within which union learning takes place may also be expected to shape the level of activity. There was relatively little difference between private and public sector organisations. However, the size of the organisation did appear to have an impact. Over 40 per cent of active ULRs in small and medium sized organisations reported that their activity had decreased in the past 12 months compared to around a quarter of respondents in larger organisations. Similarly, 44.4 per cent of active ULRs in organisations with more than one thousand employees claimed that their activity had increased, compared to just 27.3 per cent of active ULRs in SMOs.



There was also evidence that the degree of support provided to ULRs influenced activity. Where active ULRs felt valued by their line manager and particularly by senior management, their activity was more likely to have increased. Where this support was translated into the provision of cover for ULR activity and reductions in workload to facilitate the ULR role, similar results were apparent.



As Figure 12 (above) shows, a greater proportion of those ULRs that operated in sites covered by a formal learning agreement reported increased activity. Interestingly, whether or not the employer had signed the Skills Pledge appeared to have the largest impact.

### ULRs – improving workplace learning?

While ULRs may be extremely active, a key consideration is whether this is translated into improvements in learning and training. Table 7 (below) outlines ULR perceptions as to the impact of ULR activity. Almost all believed that they increased awareness of learning and the vast majority claimed that their activity

increased both the number of colleagues being trained (78.3 per cent) and the amount of training received by individuals (74.8 per cent). There are also broader benefits with two-thirds of active ULRs reporting that their activity improved management/union dialogue on learning and almost 60 per cent that it improved management/union relationships in general.

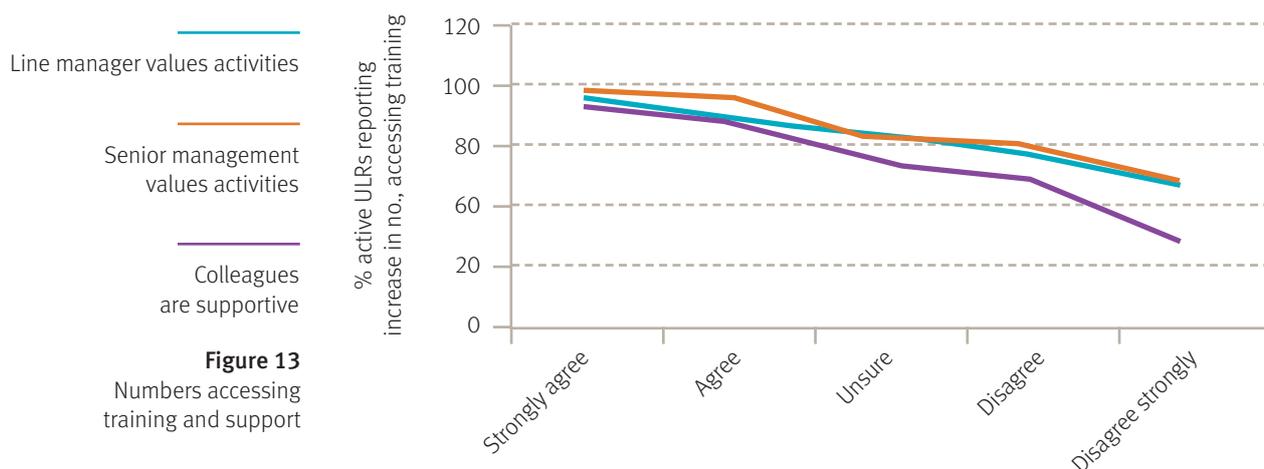
**Table 7 Impact of ULR activity**

Do you feel that your ULR activity has had any of the following effects?

	Yes	Yes, to a certain extent	No	Unsure
	%	%	%	%
Raised awareness of learning amongst colleagues	54.4	39.3	3.5	2.9
Increased interest in union membership	24.1	43.8	21.4	10.7
Improved relationships between the union and managers	22.1	37.0	27.4	13.5
Increased the number of colleagues accessing training	45.3	33.0	13.5	8.1
Increased the amount of training for individual colleagues	40.6	34.2	17.2	8.0
Helped colleagues who had no/little experience of learning	43.9	35.1	13.8	7.2
Improved management/union dialogue on learning	27.4	39.3	21.3	12.1

Even those ULRs who had ceased to be active believed that they had a positive impact. Less than 10 per cent of inactive ULRs felt that they had not helped their members improve their skills. Interestingly the results for new and established activists were almost identical which suggests that lack of experience is not an obstacle to ULRs making a difference. Likewise there was no evidence that ULRs were hampered by combining their union learning role with additional union responsibilities.

Importantly, the attitudes of colleagues and management to union learning appeared to have a significant effect on the percentage of respondents claiming that their activity had increased the number of colleagues accessing training (see Figure 13, below). This shows that almost all of the (active) respondents who strongly agreed that they were valued and supported also reported an increase in the numbers accessing training. However as the strength of that 'support' decreased so did the impact of ULR activity. Whereas 96.2 per cent of active ULRs who strongly agreed that they were valued by senior management reported an increase, just over a half of those who felt strongly that they were not valued believed that they made an impact in this respect.



**Figure 13**  
Numbers accessing training and support

Furthermore, this also suggests that successful ULR activity is also very difficult without the support of colleagues – there was a rapid ‘fall-off’ in active ULRs reporting a positive impact as the perceived support of colleagues dropped.

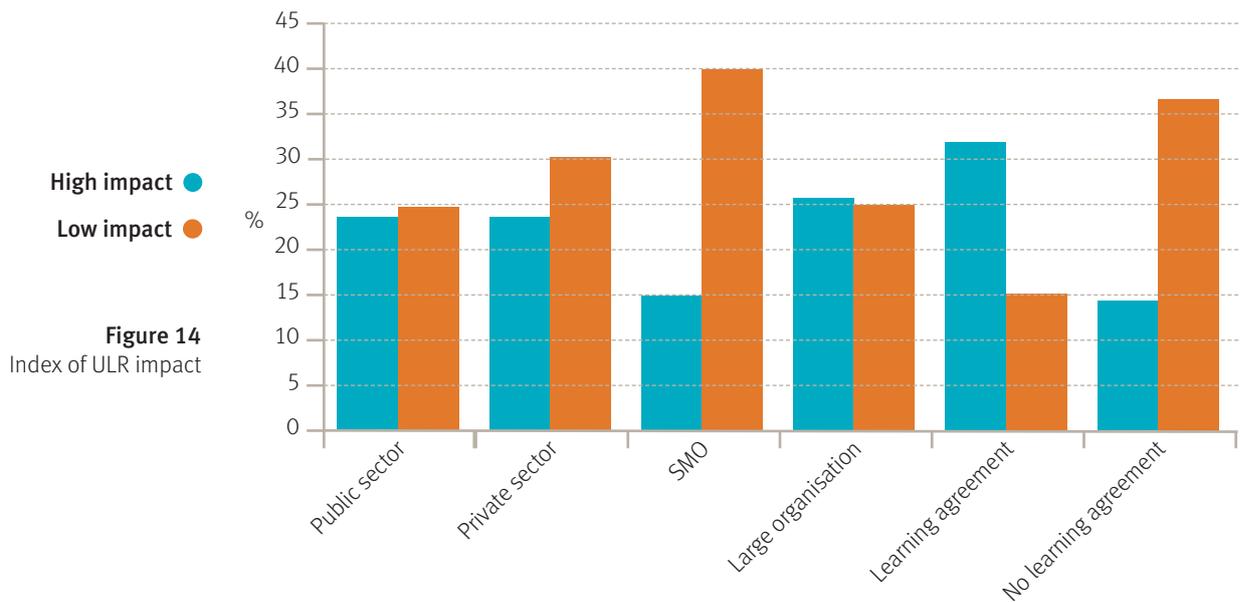
**Table 8 Impact of ULR activity on learning and training**

As a result of your ULR activity in the site(s) that you cover, has the number of your members involved in...

	Increased a lot	Increased a little	Stayed the same	Decreased a little	Decreased a lot
Training leading to nationally recognised vocational or academic qualifications	19.3	39.4	38.9	1.1	1.3
Apprenticeships	4.2	14.0	75.8	3.1	2.9
Job-related training not leading to formal qualifications	13.1	32.8	51.1	1.5	1.5
Training in basic literacy and numeracy skills	25.8	30.8	40.1	2.2	1.1
Continuing professional development	14.1	37.7	43.5	3.1	1.7
Personal interest/leisure courses	15.6	37.3	41.2	3.1	2.7

Table 8 (above) breaks down the impact of ULR activity into different types of learning and training. In general this data suggests that ULRs have continued to have the positive impact on the level of training noted in the 2007 report. The largest areas of increase appear to have been in relation to training linked to vocational/academic qualifications and basic literacy and numeracy skills. However, there was less of evidence of an increase in relation to job-related training and particularly so in relation to apprenticeships.

Finally, we combined the individual indicators of impact discussed above into an aggregate index of impact, which enabled us to categorise responses into those reporting low, medium and high impact. The results are illustrated in Figure 14 (below).



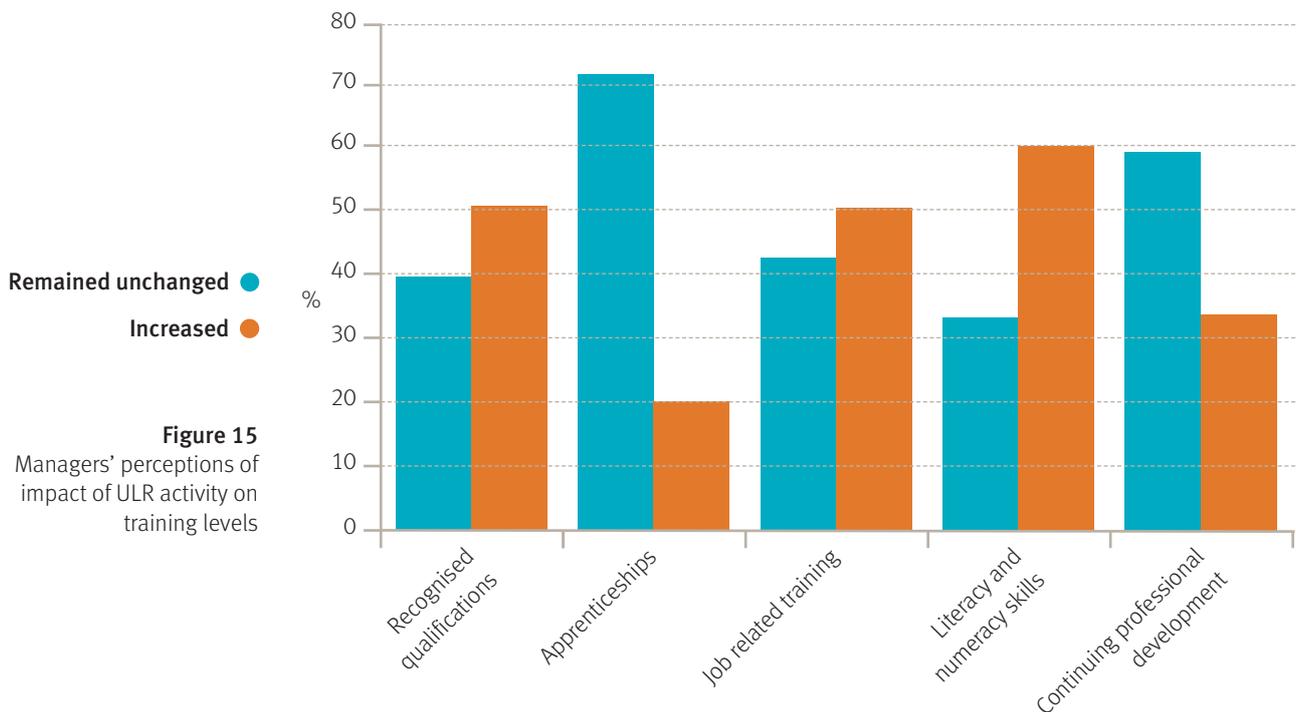
The results here bear a striking similarity to those reported in respect of activity, earlier in the report. Again there is relatively little difference in regard to sector, however, active ULRs working in SMOs were much more likely to report a low impact and less likely to have high impact than those working in large organisations. The difference was even more marked in respect of active ULRs working under a formal learning agreement. Crucially, initial multi-variate analysis of this data suggests that the largest effect on impact is seen at sites where a learning agreement and learning partnership are combined with the Skills Pledge.

### ULRs – the managers’ perspective

In addition to examining ULRs’ perceptions of employer attitudes, we also surveyed a sub-set of managers with experience of ULR activity. Almost half of those surveyed were line managers with a further third employed primarily in a training capacity. The sample was not necessarily representative as it depended on referrals from ULR respondents. For example, two thirds (66 per cent) of managers responding to the survey had a formal Learning Agreement in force in their organisation (compared to 57 per cent in the ULR survey) while 55 per cent

worked in the context of a Learning Partnership (compared to 47 per cent in the ULR survey). Consequently, the sample of managers is likely to reflect a relatively positive and supportive attitude towards union learning.

In general, management respondents suggested that ULR activity had increased the provision of training within their workplaces. More than 60 per cent of managers reported that ULR activity had increased the number of colleagues involved in the provision of basic literacy and numeracy skills while a majority agreed that there had been increases in regard to job-related training and courses leading to qualifications. Like the ULR survey, the one area where there had been only limited impact was the provision of apprenticeships. Management perceptions of ULR impact were slightly more conservative than those of the ULRs in their organisations but the overall pattern was very similar.



**Figure 15**  
Managers' perceptions of impact of ULR activity on training levels

At a broader level, most managers were consistently positive about the contribution made by ULRs. A majority of respondents agreed that ULR activity had helped to narrow skills gaps and contributed to the improvement of union management relations. Furthermore, almost 60 per cent believed that ULRs had helped to raise basic skills levels within their organisations. Interestingly a common perception that ULR activity may get in the way of normal operating priorities was not supported by the overwhelming majority (87.4 per cent) of respondents. The greater proportion (88.2 per cent) of managers surveyed claimed that they valued the contribution made by ULRs although they were not as certain whether that view was shared in the rest of that organisation, with 57.3 per cent agreeing that ULR activity was valued by their organisation's management. Irrespective of this, over three-quarters believed that ULRs were adequately supported by management. The views of ULRs within the same organisations were generally positive but there was a clear gap. For example, just over 60.8 per cent and 46.8 per cent felt valued by their line managers and senior management respectively.

## What element of ULR activity do managers value most?

“Helps people improve their basic skills when they would not have the opportunity to do so otherwise”

“Opportunity to challenge and review our provision”

“Spreading the word to potential learners who are hard to reach”

“Interaction with their colleagues to establish learning needs – being informed of funding avenues and maintaining links with local providers”

“The bridge they provide between unions and management”

“Support and guidance to the workforce who traditionally don’t access learning or want to do learning – engaging these in conversation about thinking of learning they could do”

“Staff led support for colleagues that will bring personal and organisational benefit”

“Helping those from staff groups that do not naturally access learning and training to do so – those staff where English is not their first language or those with limited literary and numeracy skills”

“It creates very good morale amongst our people and breaks down barriers between management and staff”

Managers were asked to describe the element of ULR activity that they valued most. These results are summarised above. While most managers highlighted the role played by ULRs in increasing awareness and generating enthusiasm for learning, a number also cited their ability to reach groups who have traditionally been resistant to learning, and also the positive impact of ULR activity on staff morale and management union relationships.

## The impact of recession

The recent recession posed a significant threat to work done by ULRs. The 2009 survey shows that while ULR activity has been fairly resilient in the face of these pressures, there is evidence of a realignment of management priorities that could risk the substantial gains made by ULRs in recent years.

### Constraining ULR activity?

The findings outlined in Table 9 present a varied picture. However, while there is less evidence of the recession impacting on broad support for ULR activity, there are suggestions that a realignment of employers' organisational priorities may have a negative impact on the ability of ULRs to deliver improved learning for members.

**Table 9 Active ULRs' perceptions of the impact of recession**

To what extent do you agree or disagree with the following statements regarding the impact of the recession on union supported learning at the site(s) you cover as a ULR?

	Agree strongly	Agree	Unsure	Disagree	Disagree strongly
	%	%	%	%	%
There is a greater focus on job related training	16.1	42.8	24.5	14.8	1.8
There is reduced demand for learning from members	4.2	24.3	32.3	34.2	4.9
My line manager is less supportive of my ULR activity	6.5	14.4	26.7	45.0	7.3
Senior management is less committed to union learning	10.5	24.1	33.9	27.5	4.0
Spending on training has been cut due to the recession	16.8	28.3	32.3	20.3	2.4
I have less time for ULR activities	9.7	23.8	16.4	42.6	7.5

In particular over half of the active ULRs questioned agreed that the recession has sharpened the focus on job-related training while over 45 per cent reported cuts in spending on training. In most workplaces, demand from members for union learning has held up and line managers remain supportive. However, around one-third of respondents claimed to have less time for ULR activities while similar numbers argued that the recession has undermined senior management commitment to union learning in general. Finally, only a small minority (15 per cent) of ULRs who had become inactive agreed that the recession had caused them difficulties.

There was some variation when responses were examined in terms of sector, size and the presence of a learning agreement. Overall, a tentative image emerges which shows that while ULR perceptions of management attitudes to, and priorities regarding, union learning have been affected by the recession, the concrete impact has been felt most (to date) by those working in smaller, private sector organisations without the protection of formal learning agreements.

### Changing managers' priorities?

A set of questions regarding the impact of the recession was also put to managers. Interestingly, they shared the views of ULRs in regard to job-related training.

**Table 10 Managers' perceptions of impact of recession on union learning**

To what extent do you agree or disagree with the following statements regarding the impact of the recession on union supported learning at the site(s) at which you are a manager?

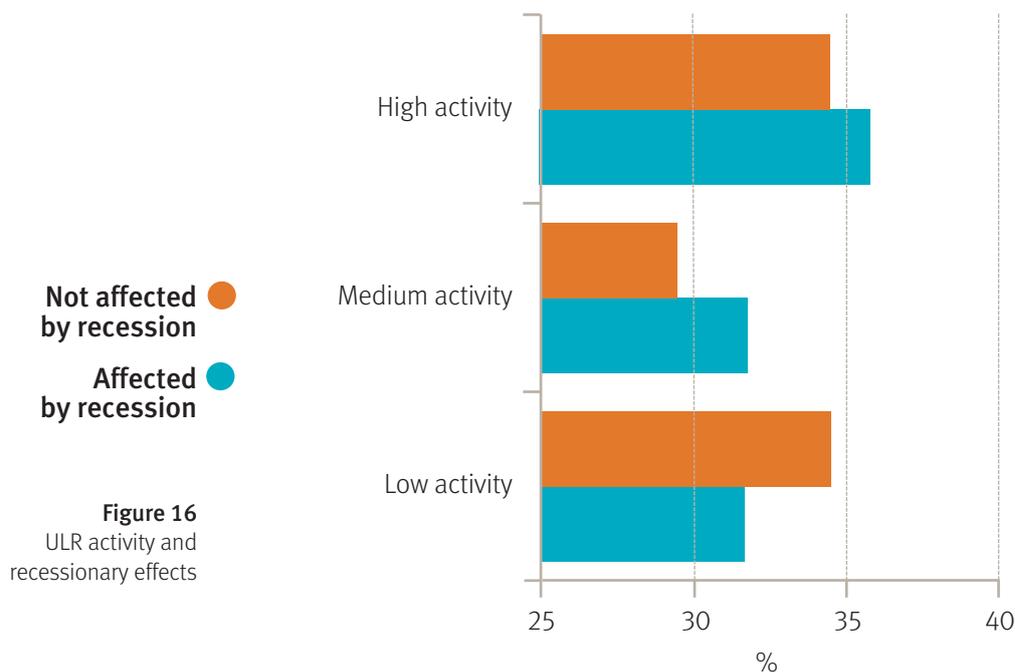
	Agree strongly	Agree	Unsure	Disagree	Disagree strongly
	%	%	%	%	%
There is a greater focus on job related training	4.5	52.7	17.9	24.1	0.9
There is reduced demand for learning from employees	0	12.5	21.4	58.0	8.0
I am less supportive of ULR activities	1.8	2.7	7.1	71.4	17.0
Senior management is less committed to union learning	1.8	11.6	23.2	52.7	10.7
Spending on training has been cut due to the recession	6.3	36.6	11.6	35.7	9.8
There is less time for ULR activities	5.4	11.6	19.6	55.4	8.0

A similar proportion of managers (42 per cent) to ULRs reported a cut in training spend due to recessionary pressures. However, in other respects, managers were more positive. While over a quarter (28.5 per cent) of ULRs reported reduced demand for learning, this view was only held by 12.5 per cent of managers. Managers also largely refuted the idea that the recession had undermined either their personal or organisational commitment to union learning. Only 4.5 per cent of respondents reported that they were less supportive of ULR activities.

When we looked at managers' responses against those of ULRs from the same organisations, a clear perception gap appeared. For example, only 4.5 per cent of managers felt that line management had become less supportive as a result of the recession compared to 19.3 per cent of ULRs. Almost one-third of ULRs felt that they had less time due to the economic downturn compared with just 17 per cent of their managers.

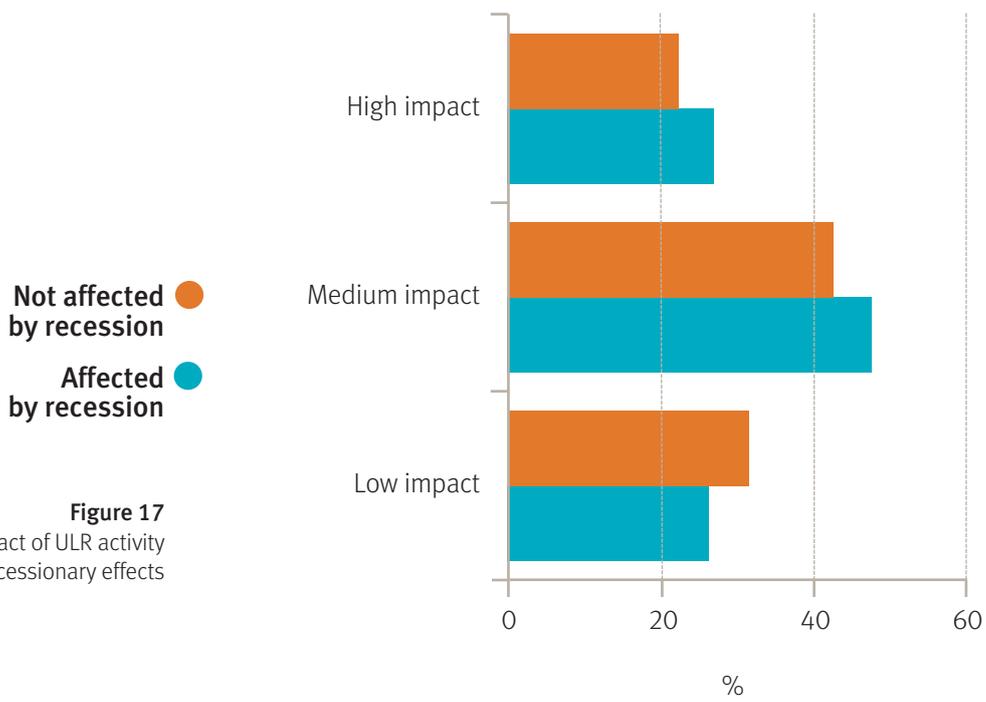
### The recession – activity and impact

We also examined the indices of activity and impact (discussed above) in respect of those active ULRs who reported that their organisation had suffered at least one of the following as a result of the recession: employment reduction or lay-offs; short-time working; wage freeze or reduction; and non-renewal of fixed-term contracts. Overall 59 per cent of respondents indicated that the site that they covered as a ULR had experienced one or more of the above effects.



**Figure 16**  
ULR activity and recessionary effects

However, as can be seen from Figure 16 (above) there was little difference in terms of activity between those sites affected by the recession and those that were not. In fact, if anything those that were affected by recession were marginally more likely to report higher activity levels.



**Figure 17**  
Impact of ULR activity  
and recessionary effects

When we examined the impact of ULR activity (see Figure 17 above) there was limited evidence of a recessionary effect. Those active ULRs who reported a negative recessionary effect were marginally less likely to also report high impact (24 per cent compared to 28 per cent), however they were also slightly less likely to report a low impact.



## Summary and conclusion

Over the last ten years union learning representatives have played an increasingly important role in the development of workplace training, the improvement of basic skills and the extension of trade union organisation. On the evidence of this research, the fifth national survey of ULRs, ULR activity and its impact on working people and their organisations continues to grow, despite the challenges of recession, global competition and political uncertainty.

ULRs themselves represent a new generation of union activist – with over a third completely new to trade union organisation. The ULR community is also increasingly diverse and consequently more representative of the contemporary UK workforce. While ULRs tend to be concentrated in the public sector, and other areas where trade union organisation is already well established, they can be found in increasing numbers working in the private sector and within small and medium-sized organisations.

Despite the challenging context within which many ULRs work, they paint a positive picture of their activity and their impact. The vast majority of ULRs provide information and learning advice to their members, arrange courses for their colleagues; and seek funding to underpin the development of learning. Overall there is evidence that ULR activity is increasing. Furthermore, most ULRs claim that they have both increased awareness of learning and also increased the number of individuals being trained and the amount of training those individuals received.

Crucially, this positive view of their impact was generally shared by those managers who took part in this survey. Six out of ten managers reported improved basic skills in the workforce as a result of ULR activity while a majority of management respondents said that ULRs had helped to close skills gaps and improve union-management relationships.

However, there are crucial obstacles to effective ULR activity. Typically ULRs have to use their own time to assist their colleagues with learning. While the majority receive reasonable time-off, most are then expected to make-up the work that they have missed. Consequently many ULRs appear to feel that work pressures restrict their ability to maximise their impact on workplace learning. This is only likely to intensify given the challenging economic context facing many organisations.



Therefore, the degree to which ULR activity is supported is central. There was little evidence that a lack of union, TUC or colleague support was problematic. But ULRs were more ambivalent about the attitudes of their employers. Importantly, less than half felt valued by either line managers or senior management. Furthermore, evidence from both ULRs and managers confirmed that the recession had seen increased emphasis placed on job-related learning.

However, a consistent pattern throughout the survey results was the influence of formal structures that support union learning. For example, where formal learning agreements and learning partnerships were in place, activity and impact appeared to be higher. This effect was strongest where these were combined with the employer signing the Skills Pledge. In short there appeared to be a virtuous circle of employer commitment, ULR activity and improved training outcomes.

It is widely accepted that skills development is a crucial ingredient in developing long-term sustainable improvements in productivity, quality and competitiveness (Leitch, 2006; BIS, 2009; DIUS, 2007; 2009). Moreover, the critical role played by ULRs in promoting and delivering workplace learning has also been acknowledged. This survey provides further evidence of the contribution that is currently being made by ULRs. However, it also demonstrates that if they are to maximise their impact ULRs need the support and commitment of their employers and union learning needs to be firmly embedded within robust workplace institutions.

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