



Usdaw's Lifelong Learning Work

Usdaw
*Union of Shop, Distributive
and Allied Workers*

Foreword



For far too long, people have had only one shot at education. If their time at school was not a success for any reason that was it. By the time you were sixteen, you had had your chance. That was the end of your education and your chances of getting help to develop your skills and talents.

Time after time the figures show that the sooner you leave school, the less access to training and learning you get as an adult from your employer or from the adult education system – and the later you leave school or college the more likely you are to get access to training through your employer or through the adult education system.

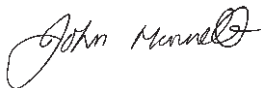
Unions have always understood that inequality of access to affordable education and training was a great injustice. Nowadays, when change in the workplace is so rapid, no one can expect a job for life. Inequality of access to adult learning is even more damaging to peoples' life chances. The opportunity to develop skills is the only route to security of employment.

But it is not only damaging to people's lives: it has also damaged the economy and the country as a whole. This waste of people's talents and skills deprives the economy of skills at a time when all developed economies are trying to become high-skilled.

Usdaw's Lifelong Learning initiative, helped by the Government's Union Learning Funds, has come a long way to help challenge this inequality of access to learning. With the success of our campaign for statutory rights for Union Learning Reps and with Union Learning Reps entering our Rule Book on an equal footing with other workplace reps, this work has come of age. It is truly becoming part of Usdaw's mainstream.

This is the Executive Council's second statement on Lifelong Learning. It summarises our progress since 1999, and details the wonderful work of our Union Learning Reps. But it also sets out our strategy and defines the next steps in our work to embed access to affordable learning in Usdaw organised workplaces.

It shows how together we can strive to remove the blight of inequality of access to adult learning and, through this, contribute to a fairer and more just society.

A handwritten signature in black ink that reads "John Hannett".

John Hannett
General Secretary

Usdaw's Lifelong Learning Work

Usdaw's Lifelong Learning work was formally launched and given direction by the Executive Council Statement on Lifelong Learning at our 1999 Annual Delegate Meeting. From this beginning the work has grown very quickly.

Since then:

- Over 20,000 Usdaw members have re-engaged in some form of learning.
- Union Learning Reps have won legal rights and a growing network of more than 500 trained Usdaw Union Learning Reps has been established.
- Over 50 workplaces have set up, or are in the process of setting up, Workplace Learning Centres.
- Agreements and policies have been negotiated with employers, committing employers to working to make Lifelong Learning affordable and accessible.

We have grown from piloting different approaches in a small number of workplaces to beginning to embed and mainstream access to Lifelong Learning across all the sectors we organise – in workplaces large and small.

This makes it timely to sum up our experience, enrich our policy by incorporating what we have learnt and identify some key steps to move forward our initiative to make learning affordable and accessible for our members.

This Executive Council Statement will:

- Begin by looking at what is meant by Lifelong Learning and what it means for Usdaw members and the broader context in which we work.
- Outline some of the key principles that guide our Lifelong Learning Strategy.
- Our experience has allowed us to define different approaches to suit the different situations in which Usdaw members work. The third section will look at these in some detail.
- Outline the key steps we need to take to move the work forward.

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Section 1 – Lifelong Learning and the Skills ‘Gap’

This section explains:

- Why Lifelong Learning has become a prominent trade union issue.
- Why our members miss out on adult learning.
- What is the nature of the UK skills crisis.

What is Lifelong Learning?

Lifelong Learning concerns the learning that someone participates in throughout his or her life – both as an adult and as a child. Lifelong Learning challenges the view of learning as just a once in a lifetime experience at school.

The concept aims to express the idea that we go on learning throughout our lives. It's about people continuously learning, acquiring and developing new practical skills and going on to learn more and different skills over time.

The part of Lifelong Learning that concerns Usdaw is adult learning. Adult learning has three aspects:

- The 'job related' training a person needs or should have to do the job they are currently doing.
- Career development for the job they might be doing in five or ten years' time.
- Personal development such as improving literacy and numeracy skills or learning a language.

These three types of learning often overlap and support each other. If a person gets involved in personal development such as improving their writing skills or learns how to use a computer, this can make them more confident to apply for a different job – for example to move from a shop floor role to an office role or to become involved in their employer's job related training programmes.

These three types of learning can be thought of as three overlapping circles (see diagram below), with each circle feeding into and supporting another circle.



For many years Usdaw members have missed out on adult learning because often:

- Their jobs don't attract much job related or career development training.
- It is difficult to participate in career or personal development because courses are not accessible or are held at the wrong times for busy people with jobs and caring responsibilities.
- Our members' confidence in their own abilities has been shattered by negative experiences at school, and poor quality company training programmes.

There are billions of pounds spent on adult learning and very little of this is spent on our members. Usdaw members are missing out.

Key Facts

Those that have most, get more...

- Managers and professionals or those with a degree are five times more likely to receive training than people with no qualifications and/or in an unskilled job.

And those that have least, get least...

- Three in four workers with Level 4 qualifications have had training in the last three years, compared with only one in five of those with no qualifications.

Why has Lifelong Learning become an issue today?

Unions have always been involved in adult learning. At the founding conference of the TUC in 1868, one of its objectives was to increase the level of technical education available to workers. Unions have always campaigned for better schooling and learning opportunities – both for members and their families.

However, the last ten years have seen an explosion of interest in Lifelong Learning. Why?

There are sound economic reasons:

- The world of work changes fast. The idea of a job for life has disappeared. Even if someone works for the same employer, the types of jobs people do change. But most people now work for four or five different employers during their working lives, often doing different types of work requiring new skills.
- Changes in the labour market over the past 20 years have led to a demand for higher levels of skills. Our members recognise that enhancing their skills helps with job security.
- Technology is transforming the way we live and work. Computer skills are becoming ever more important for work and for leisure, for example for booking holidays. Usdaw members are becoming very conscious that many of them are on the wrong side of the Digital Divide, and feel left behind.

There are personal and family reasons:

- Many Usdaw members recognise how important learning is to their children's future and want to brush up their skills so they can help them with their homework.
- Many Usdaw members are recognising that access to learning can lead to a better quality of life for themselves; it is also a path to a more active and assertive membership.

There are political reasons:

- Political change – Thatcher’s Tories aimed to develop Britain as the sweatshop of Europe, with an unregulated labour market and unskilled disposable workforce. The Labour Government is determined to establish a high-skills, high wage economy rather than the low-skilled, low wage economy of the Thatcher Government. It is important that we as a Union are involved in raising skills so our members don’t miss out on the jobs of the future.

But above all, this is a question of social justice:

- Usdaw members are missing out on the billions of pounds spent on adult learning. Without Usdaw helping to make learning accessible and affordable for our members, the billions spent on adult learning will continue to be spent on the people who already have the most spent on them – the well paid and the highly qualified.

Key Fact

In 1986, 54% of jobs required at least Level 2 (5 good GCSEs/NVQ Level 2) qualifications on entry. This had increased to 62% of jobs in 2001.

By 2010, 70% of new jobs in the UK economy will need degree level (Level 4) skills.

Key Fact

Nearly three in four employees use computerised or automated equipment and nine in ten new jobs demand the ability to use information technology.

Why do Usdaw members miss out on adult learning?

Usdaw members miss out on job related training because:

- When they do spend money on training, employers spend less on training a shopfloor worker than they do training a senior member of staff.
- Those who have had the most money spent on their education when they were young are most likely to have more spent on them as an adult.
- Our members usually work in jobs which have (and sometimes require) very little training. Consequently there is little access to learning through work, and often not much of a learning culture in the workplace.
- Training is often ‘on-the-job’ with little access to ‘off-the-job’ training or recognised qualifications.

The Government’s White Paper ‘21st Century Skills – Realising our Potential’ characterises the ‘Wholesale and Retail’ and ‘Transport, Storage and Communication’ sectors as having ‘low levels of training’ and a ‘workforce poorly qualified to levels 2/3’. In fact, as the White Paper shows, these sectors are among the lowest providers of ‘off the job’ training.

21st Century Skills – Realising our Potential (2003)

But it is not only training provided by the employers that our members miss out on. There are barriers to participating in other forms of learning:

Learning is often inaccessible – in the wrong place, at the wrong time!

- Often learning happens in a **place** that is difficult to get to, particularly if you have to rely on public transport.
- Often learning happens at **times** that make it difficult for those in work to attend, particularly if you work shifts or are in a store that is open 24 hours a day.

- Often learning is delivered in a **style** that is not suitable for an adult returning to learning.

Learning is expensive – particularly if you are low paid!

- Learning can be very expensive, and is getting more expensive. A basic computer course (for example ECDL) can cost £150 to £350. A night class at a college for an English Language or Maths GCSE can easily cost over £170. For Usdaw members on low pay the cost of learning is a major barrier to returning to learning.

Personal circumstances can be a barrier too because:

- Many Usdaw members have not had a positive experience of learning – either at school or through some very poor company training schemes. Often their schooling made them feel that they had failed and that learning was not for them. Union Learning Reps often find they have to put a lot of effort into supporting and encouraging members to return to learning.
- Some Usdaw members have basic skills problems that have never been recognised or dealt with. For others their basic skills have gone rusty and need to be boosted.
- Often, family commitments such as being a carer for children or the elderly make attending courses difficult, particularly for our women members.

Unless these barriers to learning can be dealt with, very few of our members will return to learning. To make learning accessible, Usdaw's Lifelong Learning Strategy has been to encourage employers to spend more on training our members as well as addressing these barriers to learning.

Key Fact

- One in three workers say their employer has never offered them any training at all.
- The Usdaw/University of Leeds report 'Training Matters' showed that shop workers received very little 'off-the-job' training and the training they did receive rarely led to a qualification such as an NVQ.

What kind of learning do our members want?

Our members want learning that is accessible and affordable. Often this means they want learning delivered in the workplace – at times to fit around their shift patterns.

They want access to a broad range of learning – for example British Sign Language, European Languages, Plumbing, Football Coaching, Digital Photography as well as NVQs, Skills for Life/Basic Skills and IT courses.



Members signing the word 'Usdaw' using British Sign Language

Our experience has taught us a lot more about what our members want. Everyone is different, so the following points may not apply to everyone, but as a general rule they are a good guide:

- Our members initially prefer shorter courses. They don't want to commit themselves to too much, and want to ensure they have made the right decision. Usually a 10 or 12-week course is the best thing to start with. Often short taster courses (maybe up to six hours long) are a good way of encouraging the cautious or the uncertain.
- Our members like to go on courses with their friends and work colleagues. The community that is a workplace helps and encourages members to start and continue on a course. Union Learning Reps play a vital role in this.
- Members appreciate their learning being recognised. Many have never received a certificate showing their achievement. We always try to ensure the learning is linked to receiving some kind of certificate.
- Our members need to receive high quality advice and guidance. Often members know they want to do something, but they are not sure what. Alternatively they may have some sort of learning difficulty such as dyslexia. Good advice and guidance helps resolve these problems.
- In short, our members want to improve their career and personal development, and not just the skills for their current job.

So Lifelong Learning is our issue because:

- It gives members greater job security and employability, which in turn sustains and improves our membership.
- Usdaw members work in jobs that have very little access to training – because of the jobs they do and because the employers have a record of providing the minimum of training. What training they do get tends to be 'on-the-job' training with little or no access to recognised qualifications.

- It helps make the Union more visible in the workplace – so helping recruiting and organising.
- A better trained, more confident membership will be more able to deal with changes at work.
- A more confident membership is more able to participate in the collective work of the Union.
- It helps to broaden the activist base by bringing Union Learning Reps (with legal rights) into the workplace.
- Above all, it is a matter of social justice – our members have missed out on access to training and learning for far too long and if Usdaw does not speak up for our members, no one will.

Education and skills – years of failure

The Tories were not interested in developing Britain's broad skills base. Their economic strategy was to see Britain become the sweatshop of Europe – with an unregulated, low skill/low wage economy. They were more interested in skills for a few at the top than in improving skills and learning for all.

Britain's skills base reflects this. While skills levels at the top end reflect the best in the world, at the intermediate level and at the lower end, our skills base lags behind other developed countries (see box over the page). This is a consequence of the education and skills funding and places (grammar schools, private education and the universities) being spent on high flyers and people at the top, while the rest have been starved of funding. Recent improvements to funding by the Government have improved the situation, but there remains an immense history of under-funding to overcome.

A second factor lies in the lack of investment in skills by British employers which is widely recognised. In fact, the most recent Government sponsored report on Skills Development makes the point that if employers continue to fail to invest in skills, then a statutory entitlement to training will be needed (Leitch Review of Skills: Executive Summary).

Percentage of the workforce at different skills levels

	Higher	Intermediate	Low
France	16.4	51.2	32.4
Germany	15.0	65.0	20.0
United Kingdom	15.4	27.7	56.9

Along with other factors, such as the level of investment in an economy, a low skills base affects the productivity of an economy. Britain's low skills base is linked to, and partly explains, why productivity in Britain is lower than similar developed countries. So, for example the average French worker produces 20% more per hour than their British counterpart. The average German worker produces 13% more and the average US worker 18% more.

For the Government's vision of a high skill, high wage economy to be realised, the national skills crisis must be tackled. The Government has increased investment in adult skills and learning. However, the years of under-investment have been so great that there remains much to be done.

Over 70% of the 2020 workforce is already in work. So to tackle the skills issues, the Government has to address the skills needs of people already in work. The Government understands that unions can have a major role in this. This is why it created the Union Learning Fund and gave statutory rights to Union Learning Reps.

Union Learning Funds

The Labour Government created the **Union Learning Fund** (ULF) for England in 1998.

The key goals of the Union Learning Fund are to:

'build union capacity to sustain and embed work on learning and skills so that this becomes a core activity for all trade unions, in particular by integrating ULRs into workplace union organisation and by demonstrating the clear links between the learning and organising agendas for unions'

and to help

'develop the key role of ULRs in raising demand for learning, especially amongst workers with low skill levels and those from disadvantaged groups'

Usdaw has a very successful record of bidding for funding from the ULF, and currently receives funding to field Usdaw's National Lifelong Learning Co-ordinator and its team of field Project Workers in England.

At the 2005 election the Conservative Party pledged to end the Union Learning Fund.

Scotland and Wales

Education and Training policy and spending are matters covered by the Scottish Parliament and the Welsh Assembly. Both have established their own Union Learning Funds.

The **Scottish Union Learning Fund** (SULF) was established in 2000 to promote activity by trades unions in support of the Scottish Executive's vision for Lifelong Learning in Scotland. The fund is intended to assist effective and sustainable activity by trade unions and their partners to encourage workplace learning in its widest sense.

Usdaw has successfully bid for support from the fund for a number of years, and currently receives funding that supports a Project Worker in Scotland.

The **Wales Union Learning Fund (WULF)** was set up to support learning activity in Wales led by trade unions in partnership with employers and others.

Again Usdaw has successfully bid for support from the fund which funds a part-time Project Worker for Wales.

Both Wales and Scotland also have Individual Learning Accounts. Individuals can apply for grants which, if approved, help make learning affordable.

The Government Skills Strategy (1) – Sector Skills Councils

As well as supporting the work of unions through the ULF, and through legal rights for Union Learning Reps, the Government Skills Strategy has a number of key components. One of these components is a network of Sector Skills Councils.

Sector Skills Councils (SSCs) are employer led organisations that work under a license issued by the Government. They are semi official and receive substantial public funding. They must have a minimum of one trade unionist on their governing body.

SSCs are meant to improve their sector's performance in developing skills, productivity and business performance. They are meant to provide influential leadership for strategic action to meet their sector's workforce development needs. In particular, they are meant to analyse and predict the sector's skills needs and then take steps to try to ensure these 'gaps' are filled.

In return, they:

- Receive a substantial measure of publicly funded support.
- Have the opportunity for structured discussion with Government departments across the UK on issues relevant to skills.
- Have increased influence with education and training funding agencies and education and training providers.

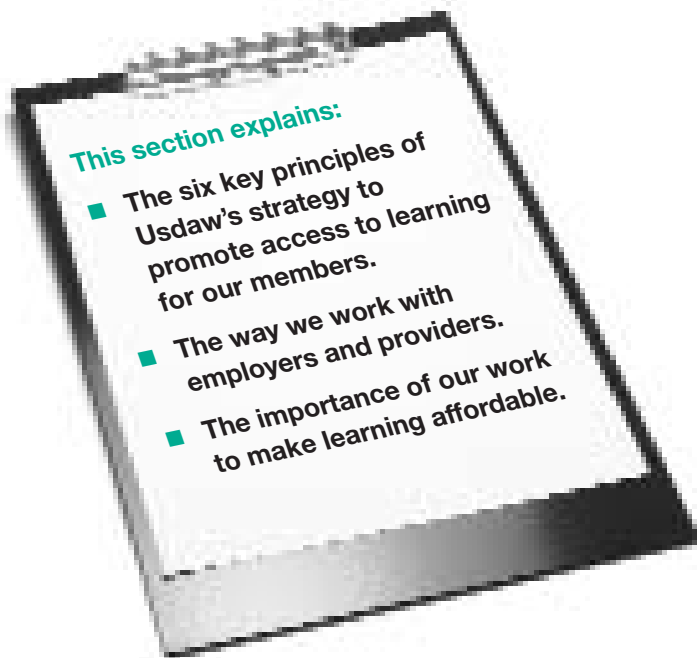
Usdaw is represented on the retail sector skills council Skillsmart.

Trade unions have identified a number of concerns relating to the increasingly influential role of Sector Skills Councils. There are concerns that:

- SSCs are 'employer-led' rather than 'employment led' organisations, with the risk that they will focus on the narrower job-specific skills and the shorter term rather than the longer term needs of the economy as a whole, or the career and personal development needs of the staff.
- A further concern is that the Government's emphasis on employer-led initiatives like 'Train to Gain' (see page 16), and the Sector Skills Councils will draw funding away from career and personal development programmes and so make the financial barriers to broader adult learning even greater.



Section 2 – The Key Principles of Usdaw’s Strategy to Promote Lifelong Learning



There are six key principles of our strategy:

- ***Build up a network of trained Usdaw Union Learning Reps***

As with all union work it is the lay reps that are the key. So, we are slowly building up a network of trained Usdaw Union Learning Reps (ULRs) as the cornerstone of our strategy.

- ***Develop partnerships with employers to promote access to Lifelong Learning for our members, and to embed Lifelong Learning in the workplace***

In some situations employers don’t want to work with our ULRs so we have to campaign without them. However, experience has taught us that we can make much more progress working together with employers to make learning accessible. This often involves an initial pilot leading to negotiated agreements with employers to embed the role of the ULR, Learning Committees and Learning Funds.

- ***Develop partnerships with providers to promote access to Lifelong Learning for our members***

Usdaw is not able to deliver all the learning our members need and want. So we have to work in partnership with providers (usually local colleges) who provide the learning for our members.

- ***Develop our work step-by-step developing different sustainable approaches to suit the different sectors our members work within***

Our Lifelong Learning work is relatively new, and there is still a lot to learn. Although the role of the ULR is now defined in legislation and in the Usdaw Rule Book, Usdaw branches and ULRs still need a lot of help and support. So we have gradually developed our work. We have now built up a lot of experience. Things are a lot clearer now but it is still important we don’t spread ourselves too thinly so we can give shop steward committees and ULRs the support they need and deserve.

■ ***Continue to campaign for affordable learning opportunities for our members***

Learning is expensive and the cost of learning is a major barrier to our members developing their skills. A key aim of our strategy is to make all types of learning (job-related, career development, personal development) affordable through negotiations with employers or through political campaigning.

■ ***Mainstream Lifelong Learning as a component within national and workplace organising strategies, working as one union team to organise the workplace***

Our work promoting Lifelong Learning should not stand apart from our mainstream organising work within workplaces. Like Health and Safety and other issues, Lifelong Learning forms part of our broad engagement with employers. Union Reps, Shop Stewards, ULRs and Health and Safety Reps need to work together as one team to organise their workplaces

The rest of this section discusses each element of our strategy in turn.

1 Building a network of trained Union Learning Reps

As with all our work, lay reps are the key. So building up a network of ULRs remains vital to making learning accessible and implementing our strategy. ULRs should be union activists or members (or alternatively an existing Shop Steward) with a particular interest in learning and trained to give frontline advice and guidance to members on a range of issues concerning learning and training. Like a Union Health and Safety Rep, ULRs develop an expertise in their own particular field while working together with other reps to organise the workplace.

Usdaw was at the forefront of the campaign to obtain legal rights for ULRs. We proposed

the motion for such rights to the Labour Party Conference and statutory rights have now been embodied in the Employment Act 2002 and in the ACAS Code of Practice on 'Time Off for Trade Union Duties'. At the 2005 Usdaw ADM, the position of ULR was incorporated into the Usdaw Rule Book.

By the end of 2006 Usdaw had a network of over 500 trained ULRs who worked in the manufacturing, distribution and retail sectors. In order that ULRs have the facility to be updated, divisional and some sectoral forums for ULRs are held. In addition, ULRs are supported through the Lifelong Learning section of Usdaw's web site and through a periodic newsletter 'The Learning Bug'.

The key elements of the ULR's role are to:

- Raise awareness about the importance of learning at the workplace.
- Support and encourage members who are already learning or who would like to get involved in learning.
- Provide members with initial advice and information about any learning and training opportunities available to them, both inside and outside of the workplace.
- Signpost members to other sources of advice and guidance such as local colleges or careers advisors.
- Ensure that members' views on training and learning are represented at appropriate forums both locally and nationally.
- Work with employers to identify learning needs and ways of improving learning opportunities for members. Often this means setting up a learning committee/steering group with the employer to co-ordinate the learning initiative on the site.
- Work with Shop Stewards and Health and Safety Reps to help organise the workplace.

2 Work in partnership with employers to promote access to Lifelong Learning, and to embed Lifelong Learning in the workplace

Although it is possible to promote learning for our members without the co-operation of the employer, if we are to succeed in our strategy of embedding learning in the workplace we need to secure the co-operation of employers.

While we seek to persuade employers of the benefits of working with us, we can not rely on good will alone. At some stage, we need to codify arrangements into agreements that are covered by TUPE regulations, and which incorporate the legal obligations of employers to recognise the role of ULRs.

Just as we negotiate agreements to promote Health and Safety in the workplace, we also need to negotiate agreements to promote access to Lifelong Learning. These learning agreements need to specify the responsibilities of each party to promote access to Lifelong Learning and to recognise the role of the ULR. They also need to establish site level Learning Committees or similar mechanisms where there can be regular discussions on how to work together to promote access to learning, and set out any arrangements for time off to learn.

Usdaw has negotiated Learning Agreements with a number of major employers at corporate or at local level including Sainsbury's Distribution, the Co-op Retail Logistics Group and the Northern Foods Group. Local agreements have also been reached with a range of other manufacturing and distribution companies including Wincanton Distribution in Kent, First Milk in Maelor and Jus-rol in Scotland. These agreements cover sites in all divisions of the Union. Pilot schemes have also been negotiated with Sainsbury's and Morrisons Retail.

Key components of a learning agreement would include the following:

- It would make clear senior management's commitment to working in partnership with Usdaw to promote Lifelong Learning. It should ensure that the partnership to promote access to learning not only includes training for the job a person is currently doing but also access to career and personal development.
- The role of the ULR needs to be recognised and supported including paid time off to train and to carry out their duties in line with their legal rights and the ACAS Code of Practice.
- The agreement needs to describe the means to implement Lifelong Learning initiatives. This may take the form of a site level Learning Committee, or in smaller sites a local forum, which will promote Lifelong Learning.
- Where possible, a commitment to help make learning affordable through a Learning Fund managed by the joint site Learning Committee, and any arrangements for time off for learning.

It's Government Policy!

'Where appropriate, employers should work in partnership with recognised unions and their Union Learning Reps to develop a workplace learning culture and to tackle low skills.'

**The Government White Paper –
'21st Century Skills – Realising Our
Potential' (2003)**

Making the case – employers can benefit as well

Employers often need some persuading to work with us to promote access to learning. However, there are real benefits for them as well as our members such as:

- Learning and training develop a more confident workforce. A more confident workforce is more able to deal with the changes that are a feature of any modern company.
- Organisations benefit from having a more flexible and adaptable workforce, which in turn can increase productivity.
- Improving the basic skills within a workforce can help to reduce errors and waste.
- Developing a learning culture and increasing peoples' skills can help internal recruitment and progression.
- Participating in our Lifelong Learning initiative helps a company develop a learning culture, and so helps develop a more positive attitude to internal company training programmes.
- Often the practice of working together with our reps can help improve employment relations.

Dairy Crest Manager:

'The initiative has benefited the company in a number of ways. Increased motivation is evident. The skills gained as a result of this initiative have a direct effect on the ability of employees concerned to perform their duties.'

The improvement in basic literacy, numeracy and to some extent IT skills has benefited the company and increased motivation all round.

The joint approach has significantly improved industrial relations. A climate in which partnership and co-operation are noticeable has been developed.'

Sainsbury's Retail Personnel Manager – South West:

'Lifelong Learning has been a brilliant confidence and morale booster in this store. All of the participants have said they were amazed at what they learnt in such a short time. All passed the exam with flying colours – something many of them would never have done outside JS. The Union has also been very supportive and encouraging of the colleagues. Any store not taking up this opportunity really is missing out.'



3 Partnerships with providers

One of the major barriers for Usdaw members becoming involved in adult learning is that the learning is often inaccessible. Courses are arranged at times and in locations that are difficult to attend and do not fit in with shift patterns or the lives of carers.

Udaw has now worked with more than 30 colleges spread across all divisions of the Union, and built up considerable experience of working together with providers (usually colleges) to try to make learning accessible and affordable. This has allowed Usdaw to develop a model agreement that workplaces can use with colleges.

A partnership with a college involves a site (usually through their Learning Committee) agreeing with the college that they will run courses at times and in ways that suit our members. Often the college will be asked to sit on the site Learning Committee. It is crucial that the college understands it must work with the ULRs, and not just with the employer.

However, in return colleges need to be able to be sure their involvement is financially sustainable. This usually means that where a college has invested its own 'hardware' (computers etc), it can be confident there will be enough learners to justify the expenditure. In addition, it means that where they are running a session exclusively for Usdaw members, there are enough learners to justify the cost of the course.

Agreements with colleges involve five things:

- Where the learning will take place.
- When it will take place.
- How it will be run.
- How much it will cost.
- The roles and responsibilities of the employer, the Union, the Learning Committee and the college.

What colleges can provide

Learning can be delivered in a number of ways:

- In sites where an employer has already set up a Learning Centre, a college may be willing to use the centre to run courses.
- In larger sites (500 staff plus), colleges may be willing to contribute to the costs of setting up an on-site Learning Centre if there are enough potential learners to make the centre sustainable.
- In smaller workplaces they may be willing to deliver learning on-site using laptop computers.
- In many cases a college will send a tutor to a workplace to run courses in the company training room.
- Colleges may also set up access points to the internet in workplaces so that members can participate in e-learning.
- Crucially colleges can offer independent and professional advice and guidance for learners to suggest pathways for learners.

4 A step-by-step approach

In order to ensure our Lifelong Learning work is successful it is important that we do not become overly ambitious and stretch ourselves too thinly. Many Usdaw members have been let down by the education system once already. We must not falsely raise the hopes of our members only to dash them again. For many years, while the best employers have applied the principles of Lifelong Learning and continuous development within their sites, the vast majority have failed. It will take time to embed Lifelong Learning into the fabric of the variety of workplaces we organise. At this stage, Shop Steward Committees, Union Branches and Union Learning Reps need a lot of support in order to take initiatives forward and ensure their success and long term sustainability.

It is, therefore, important to concentrate our efforts. Initially, after the 1999 ADM Executive Council Statement, our efforts were concentrated in a couple of sectors. Gradually we have built up experience and now are able to support branches and ULRs across most of the sectors Usdaw organises.

This step-by-step method has allowed us to develop different approaches to suit different kinds of workplaces:

- For larger or better-organised workplaces, we try to make learning accessible by getting the learning delivered in the workplace through some kind of on-site Learning Centre.
- For smaller or less well-organised workplaces, we try to make learning more accessible by trying to use some existing college or community facilities near to the workplace, or some kind of mobile facility (eg laptop computers or a Learning Bus).

Both these approaches are described more fully later in the next section of this statement.

However, remember the advice is – don't start more than we can support, and take time to get things right. Take things step by step and in time we will be able to develop Usdaw's learning initiative in all the sites we organise.



5 Campaign to make learning affordable

One of the main barriers to learning for members can be the cost. Learning is expensive, and getting more expensive all the time. For example, introductory computer courses can cost anything from £150 to £350.

If we are going to make learning accessible for our members we need to be able to make it affordable. This makes it important that where we have site Learning Committees we encourage employers to set up site Learning Funds managed by the Learning Committee. These funds can be used to help subsidise learning agreed by the Learning Committee. Many Usdaw sites have negotiated that this kind of Learning Fund is set up. There are a number of other components to making learning affordable:

- Persuading employers to take advantage of government funding programmes, such as 'Train to Gain', and to get them to do this in ways that are advantageous to our members.
- Helping and encouraging our members to apply for any financial assistance that is available (for example Individual Learning Accounts in Scotland and Wales).
- Applying to funding organisations to get financial assistance for our members to pay for learning.
- Using our purchasing power with colleges to get them to reduce their fees by bulk-buying courses on behalf of our members.
- Identifying any funds that the employer already has and getting this made accessible to shop floor staff.

- Campaigning and lobbying the Government to get it to spend public funds in ways that our members can access or make use of. Crucially this means ensuring the Government maintains its funding of career and personal development, as well as job related training.

The Government's Skills Strategy (2) – 'Train to Gain'

'Train to Gain' is the name of a national skills programme that was introduced across England during 2006. It will be at the very heart of the implementation of the Skills Strategy over the coming years, and will receive substantial funding. It will offer employers free training for employees to achieve a Level 2 qualification or a Skills for Life/Basic Skills qualification if they do not already have academic or vocational qualifications equivalent to Level 2 (e.g. five GCSEs at grade A-C or NVQ Level 2).

'Train to Gain' offers opportunities for unions to get involved at the workplace level to promote and support a training initiative that offers free training to achieve qualifications. Usdaw ULRs have experience of both 'Train to Gain', and its predecessor the Employer Training Pilots. Our experience shows that when ULRs and site Learning Committees are involved, it is possible to make 'Train to Gain' work for our members, as well as for employers. For example, at the Wigan Littlewoods Shop Direct Distribution Centre, in exchange for the 'Train to Gain' work, the college agreed to provide free ECDL courses for our members.

However our experience has highlighted concerns:

- With 'Train to Gain' the employer is the gatekeeper who decides whether to be involved or not. If the employer decides not to be involved in 'Train to Gain', our members will not be able to access the publicly funded learning.
- There is no obligation on the employer to involve or consult ULRs in decisions about 'Train to Gain'. Our experience shows this can result in decisions about who is offered learning and what learning is offered that may not work to the benefit of the workforce as a whole.
- The learning offered within 'Train to Gain' is heavily orientated to job specific training and NVQs rather than longer term career and personal development. For members in 'low skill' jobs this can be a disadvantage, and may even deprive them of opportunities for other publicly funded learning which would be more appropriate.

Campaigning for Lifelong Learning 1

Migrant workers, whose first language is not English, are often keen to learn English. English classes for speakers of other languages are called ESOL classes.

Recently the Government ended the provision of free ESOL classes. Most migrant workers, including hundreds of Usdaw members, will have to pay between £300 and £400 for even a very basic English course.

Up and down the country, Usdaw ULRs have enabled hundreds of Usdaw members to access ESOL classes. This has helped make workplaces safer for everybody – because safety procedures can be properly understood by everyone. But ESOL is about much more than Health and Safety. It is about vulnerable workers knowing their rights, and about social integration. It has also helped to promote Union membership and organisation.

At the TDG site in Rugby, there were no serious racial tensions, but people from different groups tended to keep to themselves. That is, until Usdaw ULRs helped get the site involved in a learning programme. Staff found themselves working closely together on their courses.

"There has been a huge difference in colleague relationships, with people cheerful and chatty and mixing freely with each other as they go about their work" says HR Manager Sharon Lee. "We've got all sorts of ethnic groups here and since the courses, it really works."

Usdaw, together with other unions and the TUC, has launched a campaign to have this cut in funding looked at again. As part of this campaign, in December 2006, Usdaw helped Helen Jones MP put forward an Early Day Motion in Parliament. By January 2007, over 67 MPs had supported Usdaw's campaign.



6 Mainstream Lifelong Learning as a component within our national and workplace organising strategies, working as one team to organise the workplace

Lifelong Learning should not sit apart from the organising work of the Union. Our ability to make learning accessible and affordable is dependent on our ability to influence employers. Our ability to influence employers depends on the size of our membership, and on their involvement and engagement with the Union.

Our ability to deliver on Lifelong Learning as on any issue is dependent on our level of organisation.

On the other hand, where our Lifelong Learning work is integrated into site organising strategies, it can clearly show organising benefits. (see case studies below). Lifelong Learning is becoming mainstreamed in Usdaw.

Since the 2005 ADM, Union Learning Reps have formed part of our team of reps, just like Shop Stewards and Health and Safety Reps. It is important that reps work as one team to organise their workplaces.

Working as a team to build Union organisation

Two case studies from Tesco

In the Warrington Extra Store, an Usdaw Academy Organising Officer worked with the Store Reps on a Learning Promotion event. The Area Organiser negotiated facilities for the ULRs and for the promotional event. The Lifelong Learning Project Worker helped arrange support from a local learning provider.

At the end of the three day campaign, 105 members had completed learning questionnaires identifying learning they wanted to undertake. One new Union rep and three new ULRs had been identified and 23 members recruited.

In Tesco Blackpool, a one day Learning Promotion day was organised in the same way – with reps, the AO, the RDO and the Lifelong Learning Project Worker working together as one Union team. In this case, 134 learning questionnaires were completed. Two new shop stewards and four ULRs were identified and 11 members recruited, including six Polish members of the night crew with other Polish workers joining since then.

Section 3 – Approaches to Embedding Lifelong Learning in the Workplace



Our aims and methods

Our aim is to embed promoting access to learning in all the workplaces we organise.

You can compare this to the way that in the 1960s and 1970s unions changed the attitude to Health and Safety in the workplace, while also changing their own attitude to Health and Safety.

Unions had to move from a position of negotiating a bit of ‘danger money’ for working in hazardous environments to the approach of promoting safety by removing or reducing the hazard. In turn, this meant unions pushing to embed a safety culture in workplaces by campaigning to remove or reduce hazards in the workplace.

This cultural change in the workplace and the acceptance of promoting Health and Safety as a mainstream function of the Union took 10 to 15 years. It needed clear leadership from the top, legislation from a Labour Government empowering safety reps and safety committees, and the dedicated activity of thousands of lay reps. We anticipate that, in the same way, it could take 10 to 15 years to embed a positive culture of Lifelong Learning in workplaces and the mainstreaming of promoting Lifelong Learning as a core function within unions in the workplace.

So while our aim is ambitious, **we take the long-term view and expect to move forward gradually** – one step at a time.

To embed Lifelong Learning in the workplace means that it must be **sustainable** in the long-term, and what is sustainable in one type of workplace may not be sustainable in another. We now have a lot of experience at understanding what is sustainable and what isn’t, what works and what doesn’t work for Usdaw members. We know that different approaches are needed in larger workplaces compared to smaller workplaces. We know that we need a different approach in retailing compared to large distribution centres. But there is still much to learn.

This experience has enabled us to develop **two broad approaches** that work for our members. One approach can be applied to all larger manufacturing and distribution sites that are reasonably well organised. These sites would include about 20% of our membership. The second approach is more suited to smaller, less well organised sites and to the retail sector.

Approach 1 – For larger, better organised workplaces

For larger, better organised workplaces where there are enough potential learners to sustain a Learning Centre we have adopted the approach of making learning accessible by taking it into the workplace and establishing some form of **on-site Learning Centre**.

This approach has a number of key building blocks. These are briefly described below:

1. Establish a network of Union Learning Representatives in the workplace

The foundation of Usdaw's work on Lifelong Learning is our network of ULRs. The first thing to agree is the training of the ULRs.

2. Establish a site level Steering Group/Learning Committee

The committee's role is to run the learning initiative on the site. Often sites start the initiative with a pilot Steering Committee, and then this evolves into a site Learning Committee.

The Steering Group/Learning Committee needs to have management representatives who have authority (ie operational managers, not just trainers) as well as the ULRs. The learning provider can be asked to join the committee. This committee is set up as soon as possible after the reps are trained. So everyone understands their roles it is important that the Steering Committee has agreed terms of reference.

3. Establish a partnership with a college or learning provider

The Steering Group/Learning Committee jointly identify and agree a provider to deliver the learning.

This is usually a local college. Often the Steering Group/Learning Committee will invite different local colleges to bid to become the provider. Sometimes sites use more than one provider. Colleges differ in how flexible they are and in how much they will contribute to making the learning affordable.

4. Identify learning needs and hold regular learning promotions

The Learning Committee need to find out what our members want to learn.

Usually this is done through circulating a questionnaire. This is high profile in the workplace and it is important the ULRs are seen to be involved, so this is best done by the ULRs themselves.

The results can then be analysed and recorded. Once the training needs have been identified you can start discussions with providers to ensure those needs are met.

Following the first wave of learners there will then need to be further regular promotions. These take a variety of forms but usually involve all the reps on the site working together. Usually they involve promotion events in the canteen, running short (two hour) taster courses or demonstrations etc. Again these are very visible events in which Usdaw is prominent and should be used to build membership.

5. *Negotiate a Learning Agreement*

Just as we have negotiated agreements to promote Health and Safety in the workplace, we also need agreements to promote Lifelong Learning.

These agreements need to specify the responsibilities of each party (ie management/unions) and recognise the role of the ULRs and their rights to carry out their duties and access appropriate training. The agreement should also establish an approach to setting up a site Learning Committee or other mechanisms to promote learning, and a site Learning Fund to help make learning affordable. The agreement also needs to clarify any time off for learning.

Often these policies are agreed after a pilot has taken place.

6. *Make it part of your organising strategy*

The learning initiative will raise the profile of Usdaw at the site. It is important the reps take advantage of this to increase membership. This will need to be planned and may not happen spontaneously.



Promoting Lifelong Learning in the Retail Sector

Case studies in the retail sector

1. A single company mobile ULR – using Scottish Individual Learning Accounts

Morrisons Retail agreed to pilot working with Usdaw in their stores in Scotland. Initially this involved stores in the West of Scotland but has now spread to cover the whole of Scotland.

ULRs were trained for each of the stores. The stores were then co-ordinated by a seconded mobile Union Learning Rep who co-ordinated the ULRs just within Morrisons. She helped bring learners from different sites together and liaised with providers.

To help pay for the learning Usdaw promoted the use of Scottish Individual Learning Accounts.

More than 70 staff have become involved studying a broad range of topics from IT skills to Sign Language. The promotional events in the stores helped build a Union presence and build membership.



2. A multi-company mobile ULR– using a local authority learning centre.

Scarborough is a compact town which has a community learning centre with child care facilities. A mobile ULR was seconded by Tesco. She developed a network of trained ULRs in a range of stores (Tesco, Woolworths, Sainsburys, Morrisons etc) in the town.

Using the community learning centre helped pay for the learning because it was subsidised through the local authority and local grants.

Over 70 members have taken advantage of the courses and Union visibility has been raised. This has led to new Shop Stewards being identified in some stores, and increases in membership in others.



3 A single company mobile ULR – using a retail learning voucher

In the South West, Sainsbury's agreed to pilot a learning initiative with Usdaw. ULRs were identified in a range of stores, and two mobile ULRs were identified to support the reps only in Sainsbury's stores.

To help pay for the learning an Usdaw/Sainsbury's learning voucher was developed. This could be used to pay for career and personal development learning.

Over 85 members took advantage of the learning available studying IT skills, Skills for Life and in one case plumbing! During promotion days a number of new Shop Stewards were identified and members recruited.



Approach 2 – For retail and smaller workplaces

For smaller, less well organised or retail workplaces where there would be difficulties establishing an on-site Learning Centre, or where there are not enough learners to sustain an on-site Learning Centre, we adopt the approach of **mapping college and community learning facilities near the workplace, and organising our members to access learning in these facilities.**

Retailing and smaller workplaces

Ushaw has a lot of experience in organising in the retail sector. We all know the special factors that make organising in the retail sector difficult. These same factors make organising to promote learning difficult as well.

Because retailing is so varied, and our levels of organisation vary so much, we have developed a variety of ways to make learning accessible to our retail membership. Nationally the big retail companies are reluctant to fully engage with us but at local level, many managers are keen and supportive. However, at national level both Sainsbury's and Morrisons Retail have agreed to set up local pilots.

Building up a network of Union Learning Reps

As with all our work the key is to have reps that are trained as ULRs. In retailing this sometimes involves the existing Shop Stewards being trained or briefed to carry out the function of a ULR or it can involve training new activists as ULRs.

By working together with the other store reps ULRs can also ensure Usdaw gets the recognition and the recruitment dividend from the initiative.

Supporting groups of stores

In some situations stores can be grouped together and supported by a mobile or cluster ULR, or alternatively by the Usdaw Lifelong Learning Project Worker. The mobile ULR can co-ordinate learners from different stores and group them together, be a single point of contact for the provider in the area, and help and support learning promotions.

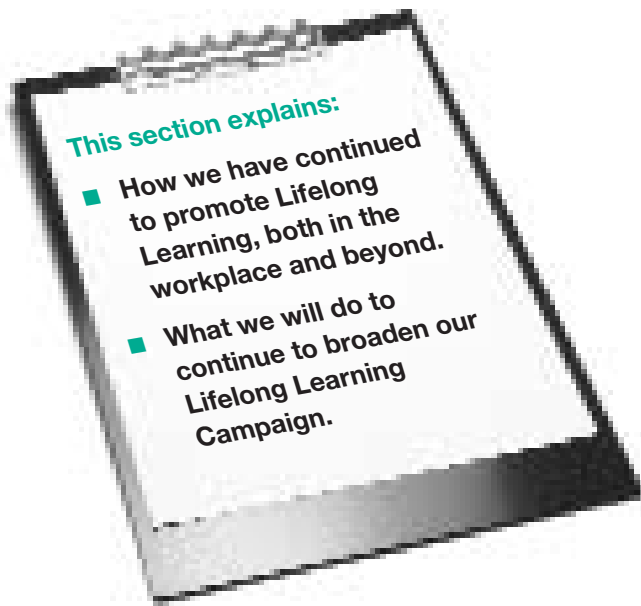
Making learning affordable

Local funding is sometimes available to help make learning affordable. This can take a variety of forms. Sometimes learning is subsidised by picking a local TUC unit as the provider. On other occasions local funding has been won which has been used to set up a local retail learning voucher. In parts of the country European Union money has helped to subsidise learning. In Wales and Scotland Individual Learning Accounts have been used.

Working as one team of reps

In the retail sector, with its 24/7 working, its high proportion of part-time workers and its huge number of shifts, it is crucially important that Shop Stewards, ULRs and Health and Safety Reps work as one team to organise the store and work together on Union-led initiatives like a learning promotion day. This is especially the case where there has been little opportunity to train ULRs.

Section 4 – The Next Steps – A Programme of Work for the Union



This Executive Council Statement has reviewed the progress of our Lifelong Learning work, has outlined the principles that guide our strategy and outlined some of the progress we have made since the 1999 Executive Council Statement.

We now need to consider our next steps on delivering the vision we established in 1999 – ‘to make Lifelong Learning accessible and affordable at all the sites we organise’ – and which our recent practice has enriched. This will involve continuing to make the case using political and negotiating methods.

Step 1 – Continuing the strong lead from the top

Usdaw has provided a strong lead in promoting Lifelong Learning in the workplaces we organise, but more widely with other unions, with the TUC and beyond.

This has been delivered by:

- Widely circulating our Lifelong Learning brochures and policies within the Union and beyond.
- Spreading the word, sharing lessons and experiences through our *Arena* and *Network* magazines.
- Continuing to press for a statutory right to a Workplace Learning Committee.
- Taking every opportunity to share platforms, events and meetings with other advocates, supporters and practitioners of Lifelong Learning.

Campaigning for Lifelong Learning 2

A legal right to a Workplace Learning Committee

Usdaw and other unions have negotiated voluntary agreements with many employers to establish Workplace Learning Committees. The more progressive employers see the advantages of these committees, the less progressive drag their feet.

Usdaw proposed to the TUC in 2004 that there should be a legal right to a Workplace Learning Committee in a similar way to the legal right to a Health and Safety Committee. Subsequently the TUC passed a resolution calling on 'the Government to set up statutory Workplace Learning Committees to ensure that employers work with ULRs in every workplace to deliver the training and learning that is relevant both to the needs of the business and the aspirations of the staff.'

In 2005, Usdaw, working with Labour MPs, helped draft a Parliamentary Early Day Motion supporting the right to a Workplace Learning Committee. This was supported by 176 Members of Parliament.

In December 2006, the official Leitch Review of Skills, suggested the Workplace Learning Committees, responsible for managing Collective Learning Funds, could be a step the Government could consider as part of its Skills Strategy.

Usdaw will continue to broaden its campaign, and argue the case with Government.

Step 2 – Continue to embed Lifelong Learning in the workplace

We have made real progress embedding Lifelong Learning within the workplace – with corporate level agreements with national companies such as Northern Foods, Sainsbury's Distribution and Co-op Retail Logistics, and with the corporate pilot schemes with Sainsbury's Retail and Morrisons Retail. But we have a way to go.

Progress will be delivered by:

- 70% of larger, better organised sites (where Approach 1 is appropriate) having a network of trained ULRs with a workplace Learning Centre, a workplace Learning Committee and a negotiated agreement on Lifelong Learning.
- Negotiating corporate level Learning Agreements where appropriate with most of the major manufacturing and distribution employers we deal with.
- Continuing to promote the learning initiative among smaller manufacturing and distribution employers.
- Learning promotion activity in a minimum of 80 major stores (where Approach 2 is appropriate).
- Continuing the 'Checkout Learning' Campaign across all divisions of the Union.
- Continuing to press retail employers to fully engage with our Lifelong Learning work.

Campaigning for Lifelong Learning 3

The National Checkout Learning Campaign

During 2007 there will be a major national Usdaw campaign that will focus on the retail sector called the Checkout Learning Campaign. The campaign will be led by a Steering Group chaired by the Deputy General Secretary.

The campaign aims to:

- Develop a national presence on accessing learning in the retail sector and to begin to mainstream accessing learning in the retail sector.
- Be a high profile campaign with a publicity focus/spotlight week during Adult Learners Week (early May) and Learning at Work Day.
- Develop Union organisation in the retail sector by using accessing learning as an organising tool.
- Extend the formal engagement of employers through agreements with major retail employers.
- Establish models for accessing learning appropriate to the retail environment.

Key targets for the campaign include:

- Holding day long learning promotions in 80 stores across the country.
- Identifying 100 new ULRs to work in teams with other store reps as well as identifying 20 new Shop Stewards.
- Making learning accessible for 1000 learners from our retail membership.
- Publishing an Usdaw Toolkit to making learning accessible in the retail sector with a major launch in the House of Commons.
- Getting press coverage – with at least 30 articles.
- Recruiting at least 250 members directly as a result of the learning promotions.

Step 3 – Integrate the Lifelong Learning Campaign into the organising work of the Union

We have already had examples where the Lifelong Learning work has helped make organising gains, particularly where Shop Stewards, ULRs and Organising staff have worked closely together. We need to build on this by:

- Always making sure our work is used to raise the profile of the Union and that we actively and consciously seek members and activists as we undertake learning promotions.
- Endeavouring to work as one team of officials and lay reps working together to promote the Union and build organisation in the workplace.
- At crucial times (for example a learning promotion) ensuring that all who can help out work together in appropriate ways.



Step 4 – Work with the Government

This Labour Government has helped to unlock the door. It has helped fund our Lifelong Learning work through the Union Learning Fund and acting on Usdaw's proposal it has given statutory recognition to ULRs.

We need to take up the assistance the Government offers around funding. We also need to feed back our experiences constructively, outlining any concerns we have while helping to promote, refine and develop policy and provision for the future.

This can delivered by:

- Working with the Government relevant Government agencies and departments to help deliver the Government's aims to tackling the UK skills crisis.
- Involving Government representatives and supporters in Usdaw events, activities and discussions.
- Working with the TUC to promote our policy of a legal right to paid educational leave.
- Publicising and promoting our work to the Government as much as to employers and our own members.
- Joining with our 'flagship' employers to share and publicise our successes to the Government.

Step 5 – Continue to campaign to make learning affordable

We have continually worked to make learning affordable for our members. This has sometimes involved some sharp lobbying with the Government as well as developing innovative ways to fund learning.

We must:

- Continue to bid to the Union Learning Fund, Scottish Union Learning Fund and Wales Union Learning Fund and other local funds to help support our work.
- Work with the TUC and others to ensure that the Adult Learning Budget is used in ways that makes affordable learning available to our members.
- Get involved with 'Train to Gain' and other employer-led initiatives to try to ensure our members get the most out of it.
- Further develop the retail learning voucher.
- Encourage the establishment of, and regular contributions to, Workplace Learning Funds.
- Encourage the use of Scottish and Welsh Individual Learning Accounts.
- Campaign for ESOL classes to be funded for low paid migrant workers.

Usdaw's Lifelong Learning work has made great strides forward since the 1999 ADM Executive Council Statement.

Since then, our ULRs have helped over 20,000 Usdaw members access learning, and our network of reps has increased to over 500.

This Statement distils our experience into a set of strategic principles to guide the Union's strategy for Lifelong Learning.

We have come a long way but there is still much to do.

So this Statement sets out a programme of work that can help us build on our successes and realise our vision of accessible and affordable Lifelong Learning for all Usdaw members.



Usdaw
*Union of Shop, Distributive
and Allied Workers*



INVESTOR IN PEOPLE

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Printed on environmentally responsible paper. Published by Usdaw, 188 Wilmslow Road, Manchester M14 6LJ